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ABSTRACT

Two documents focus on Transitional Service Centers (TSC) programs designed to help persons with mental retardation or other developmental disabilities enter into employment and community life. The procedural manual introduces the concept of transition from school to work and community living and examines steps in developing TSCs: (1) conducting a needs assessment; (2) formulating and assessing TSC objectives; (3) forming a TSC; (4) implementing the model; and (5) evaluating the TSC. Among appended information are position statements of the Association for Retarded Citizens (ARC) on productivity, wages, and the role of work activity centers and regular workshops in vocational training. A trainer's manual is intended to help local ARCs and other agencies in developing TSCs. The guide contains suggested exercises, charts, and handouts suitable for a one-day workshop. (CL)

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Transitional Service Centers

Assisting Students With Developmental Disabilities into Employment and Community Life: A Procedural Handbook

Prepared by

Association for Retarded Citizens of the United States

Jeffrey B. Schwamm, Ph.D., Project Director

EC 182 729

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1986

ARC of the United States 2501 Avenue J Arlington, Texas 76006

Foreword

These are exciting times! In Connecticut, people who are developmentally disabled are acquiring the skills to become waiters and waitresses, cooks and baker's aides, food checkers and storeroom supervisors. In Delaware, a young woman who is developmentally disabled works full-time in a state agency as a clerical aide, doing bulk copying, opening and distributing mail. Across the country, in California, small crews of people who are developmentally disabled move around a fifty-foot power cruiser scrubbing the deck, polishing brass, and stripping and refining teakwood railings. A national movement is underway to create and open up employment opportunities previously closed to persons who are developmentally disabled.

What is needed are more job opportunities and better preparation of students who are handicapped and entering the job market. What is needed are employment-related programs and services to assist these students and recent graduates in making a smooth transition from school to work and more independent living in their communities. What is needed are linkages among students and their families, schools, employers, vocational rehabilitation and other human service agencies and organizations which will facilitate collaborative efforts to achieve successful transition.

I am pleased to share with you this procedural handbook prepared by the ARC of the United States. Supported by funds from the Administration on Developmental Disabilities, this is just one product in our efforts to establish the beginnings of a national system of Transitional Service Centers. These TSCs will assist students or clients with mental retardation and other developmental disabilities into employment and community life through referral, coordination and initiation of employment opportunities and transition programs and services. We reached out across the country and established ten model sites. What each site learns during the course of implementing employment-related and other transition programs and services will benefit all agencies and organizations serving persons who are developmentally disabled. We foresee many more parents, volunteers and professionals using the material presented here and establishing centers in their own communities.

We move a step closer in making society realize the potential of our children, relatives and friends who are mentally retarded or with some other developmental disability. We move a step closer in providing these individuals with the opportunity to work and contribute to society. As a result, we see these individuals living with pride and dignity.

V. K. "Warren" Tashjian, President
Association for Retarded Citizens
of the United States

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The following ten sites were selected from over sixty applicants nationwide to become the initial models in a national system of Transitional Service Centers - ARC-Philadelphia, Pennsylvania: George Horowitz, president, E.A. Gentile, executive director; Charles River ARC, Massachusetts: George Smith, president, Paul D. Merritt, executive director; ARC of South Middlesex, Massachusetts: Cheryl L. Smith, president, William H. Garr, executive director; South Shore ARC, Massachusetts: Maria Plante, president, Leo V. Sarkissian, executive director; ARC-Wake County, North Carolina: Jo Hughes, president, Sherry Grant, executive director; Macon-Bibb Counties ARC, Georgia: T. Lynn Davis III, president, Helen Glawson, executive director; (Michigan multi-county collaborative) ARC of Ottawa County, Michigan: Lynn Ihrman, president, Steve Redmond, executive director, ARC of Kent County, Michigan: Matthew P. Woudenberg, president, Andrew E. Sugar, executive director, ARC of Allegan County, Michigan: Robin Melvin, president; ARC-Richardson, Texas: Sharon Bush, president; ARC-Pierce County, Washington: Annette Schuchmann-Bishop, president, Stan Baxter, executive director; and Opportunity Village, Nevada: Steve Miller, president, Gerald J.

Allen, executive director.

Each site demonstrates what can be done even given the reality of limited resources. Together, these ten sites offer other ARCs and developmental disabilities agencies a wealth of knowledge and experience pertaining to the process of planning a TSC and, over the next few years, its implementation.

Frances Goodman deserves special recognition for her administrative and clerical support as Project Secretary. Her professional skills and personal commitment to the project contributed significantly to its success.

Lastly, on behalf of the Association for Retarded Citizens of the United States, we are grateful to the Administration on Developmental Disabilities, Office of Human Development Services, Department of Health and Human Services, for its financial support of the project and, in particular, to Dr. Jean Elder, Commissioner of the ADD, for her strong leadership on behalf of all persons with developmental disabilities.

Dr. Jeffrey Becker Schwamm
Project Director

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1.0 Transition from School to Work and Community Living

BACKGROUND TO THE PROBLEM

One of the first questions usually asked upon meeting someone for the first time is: "What do you do?" Imagine being a person with mental retardation or other developmental disability. In the past, the presence of the handicap itself probably served notice to the person asking that such a question was entirely inappropriate. But today, there is less hesitation in asking the question as work is increasingly plausible.

People with mental retardation and other developmental disabilities are succeeding in competitive employment, with or without ongoing or time-limited support. Others are succeeding at work in sheltered environments. They are earning income. They are contributing to society. For these individuals, work is not only possible but desirable.

Today, between 50 to 75 percent of adults in the work force who report a disability are jobless (U.S. Commission on Civil Rights, 1983). In studies in three states on what happens to former special education students, the Seventh Annual Report to Congress on the Implementation of the Education of the Handicapped Act (U.S. Department of Education/OSERS, 1985) indicates a 50 to 60 percent employment rate. The more severely handicapped, however, have much less success as only 21 percent of 133 graduates were employed. Many who were employed were working in low paying, part-time, entry-level positions. These employment figures are less a function of the handicapping condition than a reflection of the community in which an individual lives and the prevailing social attitude towards people with disabilities.

Almost 8 percent of the Gross National Product each year is being spent on disability programs, and most of it supports dependence. With an estimated 250,000 to 300,000 students being graduated from special education each year there is a potentially serious unemployment problem facing an already vulnerable population (Will, 1984a). What's needed, clear and simple, is preparation for employment, employment opportunities, support for obtaining and maintaining employment, and the linking of senders, i.e., the public schools, with the receivers, i.e., the job trainers and employers.

TRANSITION

A Definition of Transition

Transition is the passage of a student with mental retardation or other developmental disability from school to work and community life with all the opportunities and risks associated

with promoting his or her greatest independence, increased productivity, and fullest integration into the community. During this process a student may require assistance in ensuring:

- relevant elementary and secondary education
- individualized planning with parents, professionals, and the student her/himself
- relevant post-secondary training
- job creation
- identification of available jobs
- analysis of skills needed to perform jobs
- career counseling
- placement assistance
- job specific teaching
- job adaptation and/or assistive devices
- ongoing support at work
- support services (e.g., transportation, recreation)
- community living arrangements

Because of the heterogeneity of persons who are developmentally disabled, some may require ongoing special services, while others only require time-limited services to make the transition into competitive employment. Still others will only require assistance from generic services available to all persons entering the employment sector. These transition alternatives assisting employment are described in Exhibit 1.1. Ultimately, the successful transition will be measured by the quality of a person's employment, residential environment, and social and interpersonal network.

B. Inadequacies in Transition

The past failure of smooth transition from school to work has been primarily placed at the doors of our public schools for their inability to provide appropriate vocational training and preparation; but in reality the failure involves many other agencies, organizations, groups and individuals who touch the lives of persons with mental retardation and other developmental disabilities. Employers, for example, may be unwilling to pro-

Exhibit 1.1

TRANSITION ALTERNATIVES

Transition With Ongoing Special Services

Several employment options have been developed which stress continual support to the worker. The most prevalent include:

Supported Competitive Employment: Structured assistance in job placement and job site training is available along with a job coordinator who provides extensive one-on-one training and follow-up. Emphasis is placed on maintaining a job.

Work Crews and Enclaves: Small groups of individuals are employed in business and industry under the daily supervision of a trained human services staff person.

Specialized Industrial Training: This employment option is usually based in the community, in a small industrial-oriented workshop setting. Workers receive wages earned from contract revenue from business and industry for performing assembly and production work.

Transition With Time-Limited Special Services

Services, like vocational rehabilitation and on-the-job training, are provided to an individual upon graduation. These services are specialized, time-limited and should lead the recipient into competitive employment.

Transition Without Special Services

The individual has the ability to work competitively. All that may be required is assistance from generic services such as from a work experience coordinator or rehabilitation counselor in job seeking and initial adjustment skills.

Adapted (with modifications) from: Wehman, P., et al., undated.

training and employment opportunities without incentives are good for business. The lack of cooperation in this frequently reflects social values and attitudes toward s with severe handicaps. Working in such an environment imes frustrates attempts by professionals, parents and ers at improving communication and positive interorganiza- relations.

alpern (1985:484), in a recent study of Oregon's secondary l education programs, reveals the following findings per- g to the links between the schools and community agencies g adults:

> ess than 50% of the {school} administrators indi- ated the presence of even informal agreements with dult service agencies concerning the transition eeds of students with disabilities. Only 10% iden- ified the existence of formal agreements. Although 0% of the teachers stated that other agencies had een contacted concerning transition services, only 0% of the parents acknowledged ever receiving such ervices. Further contributing to the lack of link- ges, only one-third of the districts provided other gencies with census data on the number of graduat- ng students each year, and just slightly more than ne-third collected follow-up information for their raduates.

imilarly, in a three-year national study being conducted by esearch Triangle Institute for Office of Special Education habilitation Services (OSERS) (Cox, et al., 1984:24), the s document the importance of interagency cooperation in ing services and programs:

> ost school systems and other involved agencies ppeared not to have carried out long-term planning egarding agency roles and the role of the public chool system in providing linkages to provide a ridge from public school responsibility to post- chool competitive or supported employment or inde- endent living for the handicapped.

rmore (Ibid.:25):

> irtually no follow-up of handicapped graduates was one to ensure a match between the services provided y the schools and the post-school experiences.

n sum, the organizational structure and staffing to bring er the schools and appropriate community agencies are absent or insufficiently utilized. The coordination and ation of services and programs is apparently minimal, at in most communities.

C. Initiatives in Transition

The recent federal policy initiatives regarding transition focus primarily on employment. Under the leadership of Commissioner Jean Elder, the Administration on Developmental Disabilities (ADD) in the Office of Human Development Services (OHDS), Department of Health and Human Services, encourages the mobilization of existing public and private agencies, voluntary organizations, job training and placement resources, the media and corporate leaders to:

(1) increase public awareness of the employability and employment needs of persons with developmental disabilities;

(2) enhance training and employment opportunities for such persons; and

(3) place 25,000 developmentally disabled persons in regular places of employment (U.S. Department of Health and Human Services, undated).

Specific initiatives of OSERS in the Department of Education include:

(1) making schools and curricula more relevant to employment needs;

(2) improving employment opportunities;

(3) improving programs for disabled high school graduates who seek additional education in community colleges and vocational-technical post-secondary schools;

(4) improving time-limited services such as vocational rehabilitation, opportunities under the Job Training Partnership Act, and transitional employment;

(5) providing transition to employment with enduring support, i.e., "supported work program" as an alternative to day activities and day habilitation services (Will, 1984b).

On May 1, 1985, OSERS and OHDS/ADD signed an interagency agreement to expand employment opportunities for persons with disabilities (See Appendix D). Specifically, its objective is to combine the financial and programmatic resources of both agencies in implementing the OSERS Supported Employment Initiative. Supported employment would expand the opportunities for unsubsidized employment in a competitive setting with appropriate support for persons with severe disabilities (e.g., work crews, enclaves,

supported competitive employment, specialized industrial training).

While the federal government has clearly been a leader in assisting students with handicaps make a successful transition from school to work, there are many examples of states and local communities throughout the country taking their own initiatives in planning and providing employment, and transition services and programs, without federal support. In Massachusetts, for example, parents and advocates were instrumental in the passage of Chapter 688, a law providing for a two-year transitional process for severely disabled young adults who will lose their entitlement to special education. An assigned state human services agency acts as a single point of entry into the adult system and will: (1) coordinate the transition; (2) work with the school, family and individual who is disabled; and (3) convene an interagency team to write an Individual Transitional Plan. The process for each client will be monitored by the Bureau of Transitional Planning at the Executive Office of Human Services.

At the local level, the Montgomery County Public Schools (MCPS) and County Government in Maryland completed a report in September, 1985 on transition from school to work for students with disabilities. For the majority of students in Montgomery County, the data indicated that existing transitional services were either inadequate or not available at all. The report concluded that several responsibilities be met in delivering its recommended services, in particular: (1) the coordination and consistent direction for the activities of MCPS, Montgomery County Government, adult service providers, parents and employers; (2) a mechanism for linking all concerned sectors; and (3) public information to enlist support for transitional goals. Montgomery County is currently responding to these responsibilities.

As a consequence of these and other initiatives, many more persons with mental retardation and other developmental disabilities will succeed in competitive employment. Hopefully, they will succeed in community life that goes beyond the hours spent at work. To ensure such an outcome these students and recent graduates, like their non-handicapped peers, are entitled to the optimum mix of academic learning, vocational education, vocational rehabilitation and independent living skills training. As is well recognized, that mix should vary in response to the individuality of each student.

TRANSITIONAL SERVICE CENTERS

A. The Purpose of a Transitional Service Center

Responding to the inadequacies in transition at the local level and to the federal government's initiatives is the introduction of the concept of a Transitional Service Center. The

overall intent of a TSC is to improve the quality of life for persons with mental retardation and other developmental disabilities who are leaving or have recently left school. Specifically, its major objective is to increase the employment of the target population in community-based work settings, promoting greatest independence, increased productivity and fullest integration. TSCs will facilitate, and where necessary, advocate for the most effective passage of these students into a full range of work opportunities and community living alternatives.

The concept of a center can be interpreted in several ways. In some communities it can be a centralized location where employment-related and other transition services and programs will be provided. In other communities a center will be a decentralized system of agencies and organizations working together for a common purpose. In some communities the local ARC will administer a center, while in other communities a similar agency or combination of agencies will assume overall administration. The system may be designed to serve one community or several in close proximity using only those agencies and organizations located within these communities' boundaries. On the other hand, the system may be designed to involve state and/or county (i.e., substate) governmental units outside the communities' boundaries in the administration and delivery of services and programs.

Successful transition is contingent upon the adequate preparation of students during their school years and the provision of an appropriate range of community resources for fullest integration. What are appropriate functions for an individual TSC depend on what currently exist in the community. For example, where a full range of employment-habilitation programs, community living alternatives, and social and interpersonal networks exist, the TSC may be needed to function only in a coordinating capacity among the participants to the transitional process. On the other hand, where gaps in programs exist, the TSC may be needed to advocate for the creation of new programs.

Four principal functions, which constitute the conceptual framework of a TSC, are proposed to ensure appropriate direction and availability of needed services and programs for students or clients with mental retardation and other developmental disabilities who are preparing to leave or who have recently left high school:

1. **Assist in the location of and access to the most appropriate combination of services and resources to meet the needs of students or clients with mental retardation and other developmental disabilities.**

   Example:

   A TSC might assist in providing parents with legal counsel and initiating the process to appeal the decision made by the school on the vocational

placement of a student with mental retardation or other developmental disability.

2. **Systematically collect, maintain and disseminate information on services and resources** available to meet the needs of students or clients with mental retardation and other developmental disabilities.

   Example:

   A TSC might train personnel in schools and service agencies in the use of computerized information systems related to community services and programs, and coordinate the placement of computer terminals at these sites for such a system.

3. **Assist in the development and support of relationships among agencies that promote coordinated services** to students or clients with mental retardation and other developmental disabilities.

   Example:

   A TSC might coordinate the development of formal interagency agreements, specifying roles and responsibilities of the school and vocational rehabilitation agency upon graduation of students with mental retardation and other developmental disabilities. The TSC may consider establishing a formalized transitional planning process for each of these students.

4. **Assist in the development of new programs and services** for students or clients with mental retardation and other developmental disabilities.

   Example:

   A TSC might highlight the incentives and economic benefits of employing adults with mental retardation and other developmental disabilities in supported competitive employment through an educational program aimed at state/local policymakers and employers.

Each of these four functions will fill some void in the present system serving persons with mental retardation and other developmental disabilities. Each function bridges the gap between schools, work and community life.

B. Establishing a Transitional Service Center

The planning stages and procedures for establishing a TSC are presented in the following chapters and illustrated in Exhibit 1.2. Five discrete stages are identified following the definition of the problem which in this chapter has emphasized the lack of coordination and integration of employment opportunities and transition services and programs. The transition problem is further defined by an ineffective process linking the critical participants involved in the transition of students or clients with mental retardation and other developmental disabilities.

Stage one is the determination of need. It includes collecting and analyzing needs assessment data, determining the target population, identifying the interorganizational network, describing the agencies, organizations and linkages in the current and future networks.

Stage two is the formulation and assessment of TSC objectives. Proposed objectives are examined in relation to the forces working for or against efforts to implement them. Critical participants are identified who may be instrumental in the implementation of these objectives.

Stage three is the formation of a TSC. In this stage an interorganizational structure to operate a TSC is selected. Representation from participating agencies, organizations and other critical participants is achieved with the establishment of formal committees.

Stage four is implementation. Here, formal procedures for implementing TSC objectives are established, implementation strategies are determined and staff are assigned task responsibilities.

Stage five, evaluation, concludes the planning process. The evaluator(s) is selected and an evaluation design is constructed.

Consistent with good planning, what is learned during evaluation feeds back into the planning process, refining the needs assessment and revising the TSC objectives where appropriate. Thus, planning a TSC is viewed as an ongoing process that is constantly subjected to review, new ideas and change.

TSC SERVICE AND PROGRAM QUALITIES

Exhibit 1.3 describes TSC service and program qualities which are suggested as reference points for selecting strategies for implementing TSC objectives. They are consistent with the normalization ideology: the residential, educational, employment, and social and recreational conditions of the individual must be as close to the cultural norm for a person of that age as the extent of the individual's disability reasonably allows. They also are consistent with the position statements of the Association for Retarded Citizens of the United States (1984).

Exhibit 1.2

PLANNING STAGES IN ESTABLISHING A TRANSITIONAL SERVICE CENTER

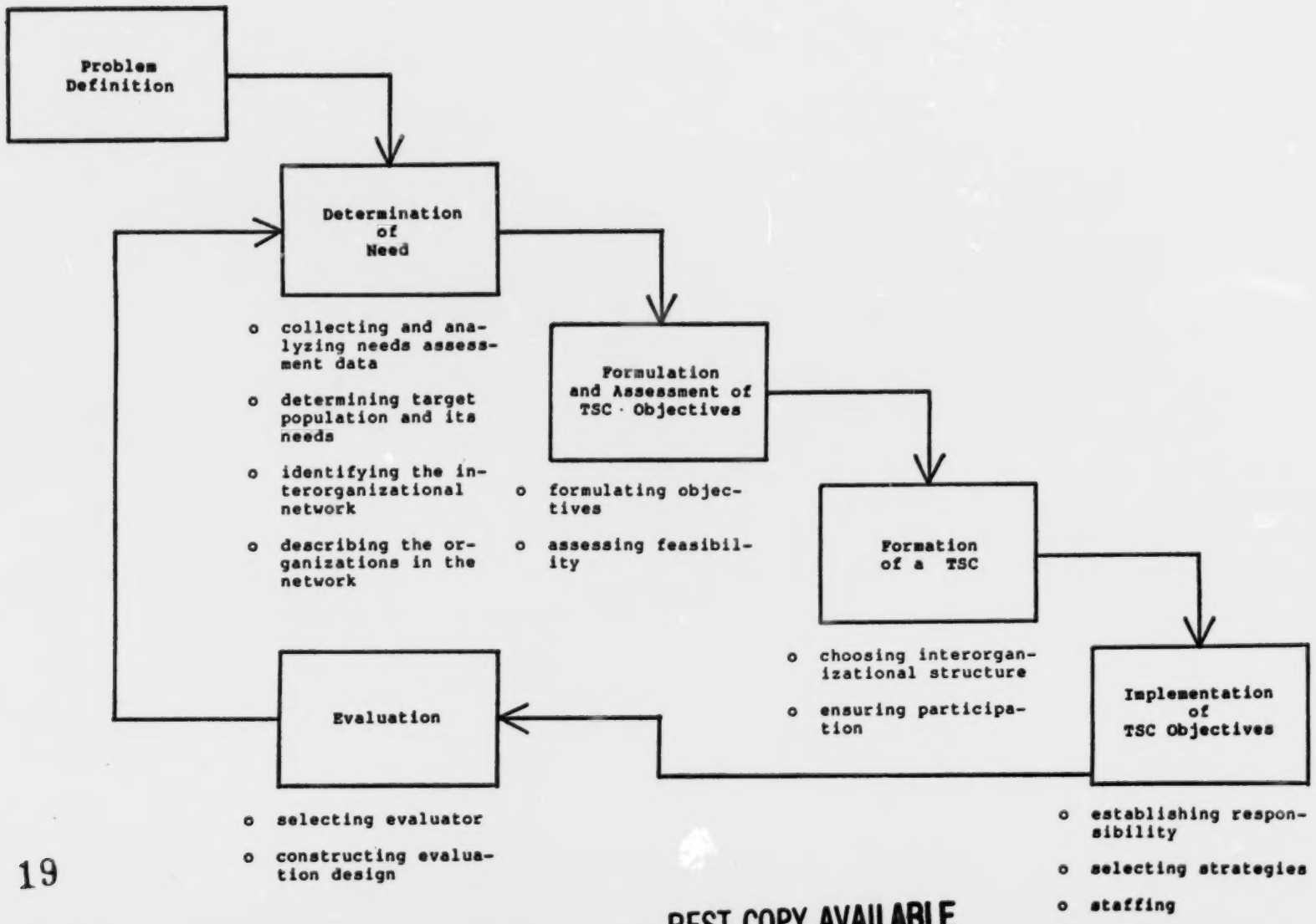

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Exhibit 1.3

TSC SERVICE AND PROGRAM QUALITIES

1. **Integration:** The daily life of the person with mental retardation or other developmental disability is to come as close as feasible to that of a non-handicapped person. Services are to be delivered in settings reflecting the integrated and heterogeneous nature of society.

2. **Age Appropriate:** Programs should be appropriate to the individual's chronological age. Programs that non-handicapped persons participate in should be designed to accommodate their peers with mental retardation or other developmental disabilities. Persons with handicaps should be given opportunities to make decisions, to exercise choice, to take reasonable risks, to accept consequences of their own behavior and to associate comfortably with peers and others who differ in appearance, interests, beliefs, abilities and life experiences.

3. **Community Referenced:** Selection of goals, training procedures and contingencies for the target population should be referenced to the current and future demands and expectations of the local community. Emphasis is given to acquiring everyday skills needed to function independently as an adult.

4. **Comprehensive:** The focal point is the person's needs for preparation and transition services in order to function as independently as possible in the community. Increased independence and productivity in post-school environments requires competence by the graduate at various tasks and in various settings. Education and training programs must develop strategies for fitting into the local economy and for teaching skills that may not normally be practical in the classroom.

5. **Self-Advocate Involvement:** The planning, implementation and evaluation of services and programs should acknowledge the preferences and choices of persons with mental retardation or other developmental disabilities. Every possible attempt should be made to empower self-advocates to make decisions affecting their lives.

6. **Family Involvement:** Successful movement into the local community requires input of parents, legal guardians or advocates. Family knowledge about the person who is mentally retarded or with another developmental disability should ensure that appropriate choices are made among options within vocational, domestic, community and leisure domains.

7. **Effectiveness:** A program or service that does not achieve specified goals for persons with mental retardation or other developmental disabilities is restrictive. The effectiveness of a TSC - its services and programs - should be measured in terms of increases in independence in daily performance in residential, vocational, leisure and community environments.

Adapted (with modifications) from: Bellamy, G. T. and Wilcox, B. (1982)

2.0 Determination of Need

OVERVIEW

The purpose of the needs assessment is to identify what employment opportunities and transition services and programs the target population needs in order to work and live as independently as possible in the community. The list of comprehensive community services and programs presented in this chapter, coupled with the descriptions of transition alternatives and the program and service qualities in the previous chapter, provide a reference point, or ideal, of what ought to be in a given community. Assessing the behavioral skills needed by a student or client with mental retardation or other developmental disability to successfully function in these work and community environments will assist in identifying the agencies and organizations providing appropriate skills training, and the gaps in employment opportunities, transition services and programs.

A TSC will operate primarily within a network (i.e., group) of agencies and organizations in serving persons with mental retardation and other developmental disabilities. The network consists of: (1) those agencies and organizations that give approval and legitimacy to the existence and operation of the TSC (e.g., schools, municipalities); (2) suppliers of necessary resources (e.g., sheltered workshops, United Ways); (3) consumers of services and programs (e.g., students or clients, their families and advocates); (4) competitors for both resources and consumers (e.g., unions, community mental health and retardation centers; and (5) various collaborators that enhance the availability, accessibility, accountability, effectiveness and efficiency of programs and services (e.g., Epilepsy Foundation, State Developmental Disabilities Councils). The needs assessment describes the current interorganizational linkages among these participants, identifying service, program and employment gaps in the network that other linkage mechanisms might alleviate.

In sum, the needs assessment will assess students and clients with mental retardation and other developmental disabilities and the service system to move them into employment and the community. The results of such an assessment are documentation for prioritizing the needs and proposing TSC objectives.

GUIDELINES AND PROCEDURES

- collect and analyze needs assessment data
- determine target population and its needs
- identify the interorganizational network
- describe the organizations in the network

A. Collecting and Analyzing Data

Many questions are asked in the determination of need pertaining to students, clients, agencies, employers, forces working for or against a TSC, and critical participants in the community. Some of the basic questions that each TSC should respond to include:

1. What are the demographic and other characteristics (e.g., behavioral skills) of the target population?

2. What are the employment and other transition needs of the target population?

3. What employment opportunities and transition programs and services are available in the community?

4. What are the linkages among agencies, organizations, groups and individuals providing employment opportunities and transition programs and services?

5. What is the employment market for the target population?

Answering these questions is a prerequisite for formulating TSC objectives which reflect an assessment of the current gaps in employment opportunities and transition programs and services for a defined population.

The answers to the above questions are dependent upon the available data and the time given to its collection and analysis. No less important are the costs involved. An agency should look at accomplishing this task as efficiently and effectively as possible. It should not feel compelled, and indeed it would probably be unproductive, to try to collect and analyze all available information. A good rule of thumb is to determine need with whatever secondary information is readily available and easily accessible. Primary data from surveys or interviews of staff, clients and other agencies and organizations are excellent sources of information on needs but collecting such data is costly and time-consuming. Surveys should be used sparingly and only when other sources of data do not address major informational needs.

It is important that there be a variety in the sources of data to avoid inaccurate conclusions based on limited and biased information. Individualized education programs and other plans provide comprehensive information on the target population. Statements of organizational mission and agency promotional material reflect what agency directors believe will impress significant individuals, groups and organizations. Similar information may be obtained through funding proposals. Program evaluations may reveal agency vulnerability related to a change in the current way services and programs are delivered. Annual budgets reflect patterns of change over time and highlight

developmental trends. Personnel practice codes may uncover formal authority arrangements and patterns of accountability.

Much can be learned from the behavior of key individuals. Important are records (e.g., minutes of meetings) of individual comments on organizational matters and positions taken (e.g., statements on issues related to the effort to establish a transitional service center, the degree of risk-taking that has been demonstrated and on which issues). Attendance at, and observations of public meetings, hearings and advisory boards are a potentially useful source of information on key individuals.

Another means of organizational assessment is to listen for complaints or aspirations from students or clients with mental retardation and other developmental disabilities and their families, legal guardians or advocates. Such information can yield valuable insights as to what will facilitate or hinder establishing a TSC and implementing its objectives.

Knowledge of the employment sector is best provided through market studies and information collected by such organizations as the Chamber of Commerce and United Way. A guide to marketing by Corthell (1982), which focuses on persons with disabilities, is cited in the Readings included in this handbook.

Lastly, who should collect this information? And, how should it be analyzed? Responsibility for data collection is clearly dependent upon the capabilities of the prospective participating agencies, organizations, groups and individuals and their respective willingness to undertake it. It would seem reasonable for the agency taking the lead in establishing the TSC to coordinate data collection in the early planning stages until the roles and responsibilities are clearly defined in the formation of the TSC and the implementation of its objectives.

The analysis of the data (and its presentation) should involve people who are responsible for or influential in funding and delivering jobs, services and programs for the target population. Included in analyzing data should be individuals who helped define the transition problem in their community and proposed the questions guiding the data collection; otherwise, many of these individuals would have little stake in defending the findings and subsequent formulation of TSC objectives. Without such involvement, the lead agency may have to expend finite organizational resources in campaigning for needed changes based upon what has been learned in the needs assessment. Descriptive narratives from students and clients with mental retardation and other developmental disabilities, family members, employers and professionals should supplement statistical presentations. Summaries should be used at all times since most people are unimpressed with extensive documentation and do not have the time to labor over it.

B. Determining Target Population and its Needs

A good estimate of the population-in-need (or target population) will assist the TSC to be responsive to persons-in-need. The population-in-need is a sub-group of the population-at-risk. This designation is more specific and identifies those individuals who, because of specific characteristics (e.g., severe or profound retardation, students 16 to 22), need a certain service or program. For example, all students with mental retardation--the population-at-risk--do not need community-based vocational training; but, all students who are severely or profoundly retarded and from 16 to 22 years of age--the population-in-need--do need this training. The organizational descriptions outlined in Exhibit 2.3, especially that of the local school system, should provide the most current figures on the served, underserved and unserved population-in-need for the present services and programs in the community.

Once identified, a more comprehensive assessment of the target population proceeds with preparing a profile of the behavioral skills required by persons-in-need to adapt successfully to community living alternatives, employment-habilitation programs and other community services presented in Exhibit 2.1. Conducting such an assessment is beyond the current capabilities of many individual agencies. Short of instituting a formal process developed to systematically gather this information, each participant should do its best to provide whatever documentation is available on the target population. Many of these behavioral skills (e.g., independent money usage, interpersonal relations, meal planning), illustrated in Exhibit 2.2 for community living facilities, should be included in individualized plans; therefore, the local school system is a primary source of such information. It is conceivable, however, that other agencies (e.g., Department of Mental Health/Developmental Disabilities, Department of Vocational Rehabilitation) are responsible for preparing individualized plans, especially if the person has been out of school for several years. Parents and other family members are certainly a vital source of information in preparing this aggregate picture of required behavioral skills.

Of utmost importance to this assessment of behavioral skills is obtaining approval for the release of confidential information from the appropriate parties. The rights of each student or client with mental retardation or other developmental disability should be protected. The interagency agreement is one method to help to ensure such protection.

The assessments of the population-in-need and the behavioral skills needed to function successfully in community living alternatives, employment-habilitation programs and other community services increase the accuracy in determining the actual need relative to the availability of current services, programs and employment opportunities. With modifications in the future environments, and with special aids to eliminate the effects of a person's disability, the result would surely be a larger number

Exhibit 2.1

COMPREHENSIVE COMMUNITY SERVICES AND PROGRAMS

Community g Alternatives	Employment- Habilitation Programs	Support Services
endent living	Competitive employment	Health
ed apartment	Supported employment	Mental health
home	Sheltered workshop	Legal
g at home	Work activity	Home assistance
foster home	Day training programs	Recreation
		Protective
		Adult education
		Transportation
		Advocacy
		Case management

Exhibit 2.2

BEHAVIORAL SKILL TRAINING AREAS
FOR SELECTED COMMUNITY LIVING ALTERNATIVES

Group Home	Independent Living
Health Care	Handles medication
Laundry skills	Clothing repair/replacement
Meal preparation	Meal planning and shopping
Social integration	Interpersonal relations
Uses an expressive language system	Language generalization
Home safety	Coping skills
Money concepts	Independent money usage
Unprompted daily routine	Independent scheduling
Recreation and leisure activities	Uses community recreational facilities
Community access	Independent community use

Adapted (with modifications) from: Schalock, R.L. (1985)

of students and others with mental retardation and other developmental disabilities ready to take advantage of their new environments.

C. Identifying the Interorganizational Network

Descriptions of the agencies, organizations and other participants serving persons with mental retardation and other developmental disabilities are essential for determining gaps in employment opportunities and transition services and programs. Any gaps will emerge by comparing the target population and its needs with the current and possible future service system and employment alternatives. To do so, it is necessary to first identify the network of agencies, organizations, etc. in the community which serves or should serve the target population.

The identification of these interorganizational networks includes the following steps (Lauffer, 1982):

(1) Place the ARC or similar agency in the center of Exhibit 2.3;

(2) List those participants (i.e., agencies, organizations, groups, individuals) in the agency's current network in the boxes on the periphery of the square. The square design may be modified to fit your situation;

(3) In a different color (or lettering), circle current participants and add those that are not presently in the network but ones you think should be in order to operate as a TSC and meet the needs of the target population.

The diagram now indicates what is and what ought to be in relation to the agency's current and possible future networks.

D. Describing the Organizations in the Network

Once the current and possible future interorganizational networks are determined, an analysis of each organization considered important to the functions of a TSC will contribute to the formulation of TSC objectives. Exhibit 2.4 provides a list of items appropriate to such an analysis. Exhibit 2.5 presents a glossary of linkage mechanisms for describing the relations among the organizations in the network.

The collection of information on the network participants assists in completing one of the four major functions of a TSC: systematically collect, maintain and disseminate information on services and resources available to meet the needs of students or clients with mental retardation and other developmental disabilities. It is a function that meets an immediate need for students or clients and their families, and one that all ARCs and

Exhibit 2.3

INTERORGANIZATIONAL NETWORK

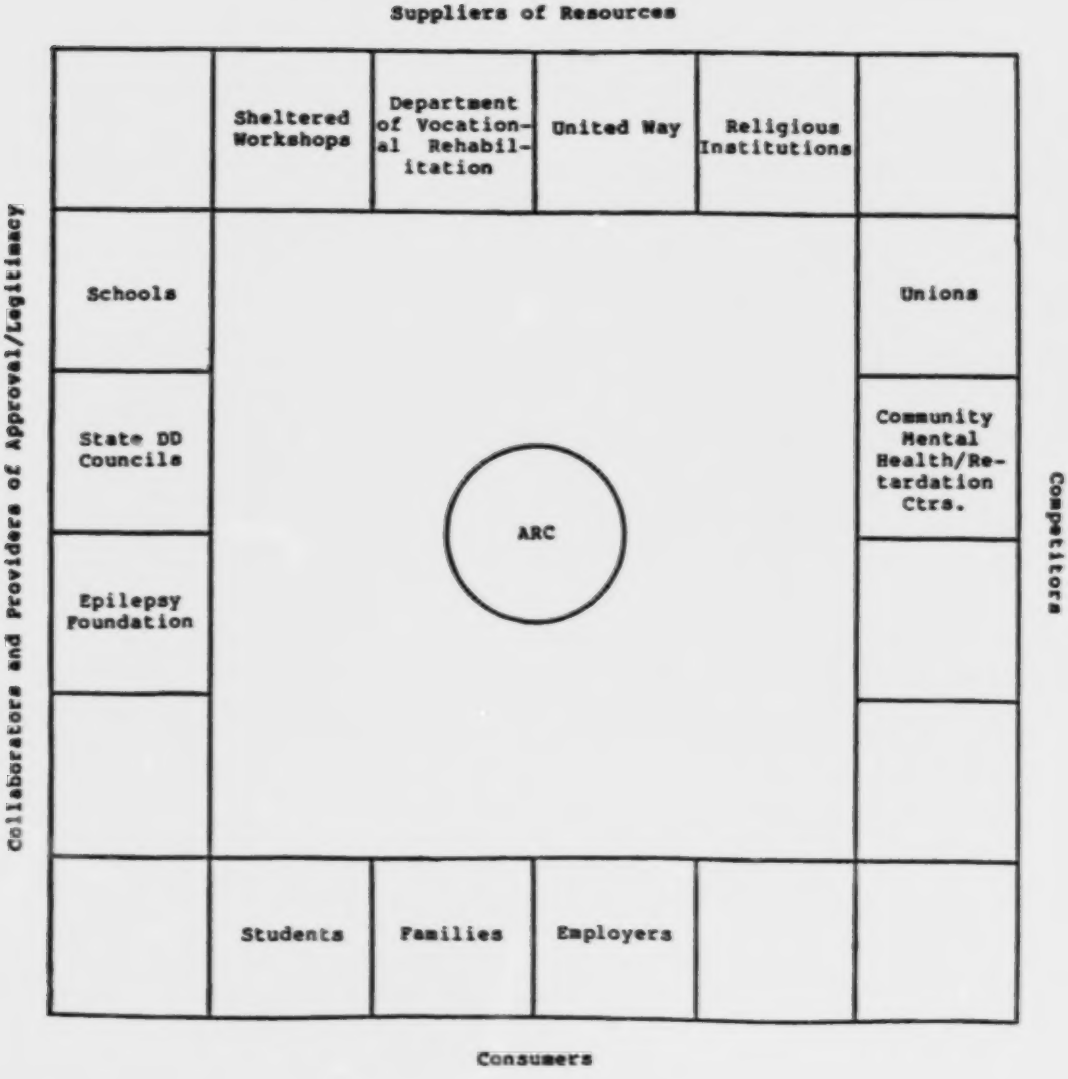


Exhibit 2.4

ORGANIZATIONAL DESCRIPTION

1. Cite official statements which describe the goals, objectives and responsibilities of the agency.

2. Identify the specific problem and issues that the agency is set up to handle. What is the rate or extent of the problem in the community?

3. Identify the services and programs that the agency offers vis-a-vis the problem and issues it attempts to handle.

4. Identify the interorganizational linkage mechanisms that the agency employs (See Exhibit 2.5).

5. Identify those clients eligible for the services and programs offered by the agency.

6. Profile the clients served by the agency:

   a. age and sex
   b. socioeconomic status
   c. place of residence
   d. most frequent presenting problem or concern

7. What admission criteria do clients have to meet in order to benefit from the services of the agency?

8. What mechanisms do staff use to select and screen clients?

9. What are the various methods used by the agency to assess clients' needs?

10. Describe any pressures (e.g., presenting problem, survival of the agency) exerted on the agency to accept or reject certain client groups.

11. Do clients or their advocates have any form of representation in the agency (e.g., Advisory Council)? If so, describe.

12. What are the conflicts and gaps in client services? What steps have been taken to resolve conflicts and close such gaps?

13. Describe staff of the agency in terms of experience, professional training and functions.

Exhibit 2.5

GLOSSARY OF LINKAGE MECHANISMS

1. **Case Management:** Staff at one agency are given responsibility for coordinating the services provided by several agencies to meet the needs of particular clients.

2. **Client team:** Staff from two or more agencies coordinate services to meet the needs of mutual clients through continuous and systematic interaction.

3. **Information clearinghouse:** Staff at one location have responsibility for collection, classification and distribution of information to several agencies.

4. **Budgeting, fundraising and allocation:** Two or more agencies coordinate development of annual budgets; cooperate in funding drives, establishing endowments and securing grants or contracts; contribute dollars or in-kind resources for a collaborative project or independent program.

5. **Intake, screening, and diagnosis:** Two or more agencies develop a common system of processing new clients and diagnosing their needs.

6. **Program design, operation and evaluation:** Two or more agencies unite their efforts to plan, implement and assess effectiveness of a program.

7. **Public relations and community education:** Two or more agencies join efforts in educating the public or raising critical consciousness on behalf of a client population or for their own resource needs.

8. **Training and staff development:** Two or more agencies cooperate on training and development by co-sponsoring events, sharing successful programs or trading their expertise.

9. **Purchase of services:** One agency pays for specific services (e.g., intake, transportation, diagnostic services) from another agency.

10. **Staff outstationing:** Staff from one agency are assigned to do their work in the facilities of another agency.

Adapted (with modifications) from: Lauffer, A. (1982)

similar agencies should attempt to accomplish. Furthermore, it is one of the most highly visible for the agency; seizing the opportunity to serve as an information clearinghouse could only enhance the agency's credibility in its interorganizational network and strengthen relations among the critical participants necessary to the fulfillment of other TSC functions.

Lastly, many of the items presented in the organizational description (Exhibit 2.4) are applicable, with minor modifications, to the employment sector. When applied, the information on the current businesses and companies in the interorganizational network will contribute to a basic market analysis that should be useful in determining job prospects.

In sum, the descriptions of the organizations in the network conclude the collection of needs assessment data. Contrasting and assessing the information gathered on the target population with the current and future interorganizational networks provides a clearer picture of the gaps in employment opportunities and transition programs and services. TSC objectives can now be proposed which address the gaps and the needs of unserved and underserved students and recent graduates with mental retardation and other developmental disabilities and their families.

3.0 Formulation and Assessment of TSC Objectives

OVERVIEW

Completion of the needs assessment provides the information for formulating TSC objectives. Each proposed objective is then examined to determine what has to occur in the community for it to succeed. The ARC or similar agency must determine the critical participants who may be instrumental in influencing successful implementation of the objective.

The feasibility study is a preliminary step in preparing a completed implementation plan. The following questions are answered by conducting the feasibility study:

(1) Does the ARC or similar agency have sufficient support of critical participants (i.e., agencies, organizations, groups and individuals) in the community to meet the TSC objective?

(2) What has to happen to allow the TSC objective to be implemented?

With such knowledge, the agency can determine appropriate implementation strategies that will move critical participants in the community to work for the creation and operation of a TSC.

There are various approaches for determining feasibility. The assessment tool suggested here is only one approach. It is intended to yield as comprehensive a picture as possible with minimal effort on those conducting the study. The comprehensiveness is dependent upon the quality of the information collected in the needs assessment.

Typically, the responsibility for completing the feasibility study will be assumed by the professional staff of the ARC or another agency with active involvement from its board members. In some situations it will be assumed by volunteers. Those assessing feasibility will be responsible for recommending objectives to the agency board which they can reasonably undertake as a TSC.

GUIDELINES AND PROCEDURES

- formulate TSC objectives
- assess feasibility of objectives

A. Formulating TSC Objectives

The needs assessment provides a clearer picture of factors contributing to gaps in employment opportunities and other transition services and programs. The agency is in a position to propose objectives. To illustrate the development of new objectives, the needs asessment may reveal that in community "X" there is a lack of vocational programs and employment opportunities for students or clients with severe and profound mental retardation. Three possible TSC objectives emerging from this situation might read:

> To work with employers for purposes of identifying and creating job opportunities for persons with mental retardation and other developmental disabilities.
>
> To work with parents to ensure them of their due process rights under Public Law 94-142 when the school does not provide appropriate education.
>
> To ensure comprehensive documentation and dissemination to parents, legal guardians and adult service providers of model employment programs for persons with severe and profound mental retardation and other developmental disabilities.

Each objective is now assessed to determine what must be done, and by whom, in order to meet it.

B. Assessing Feasibility

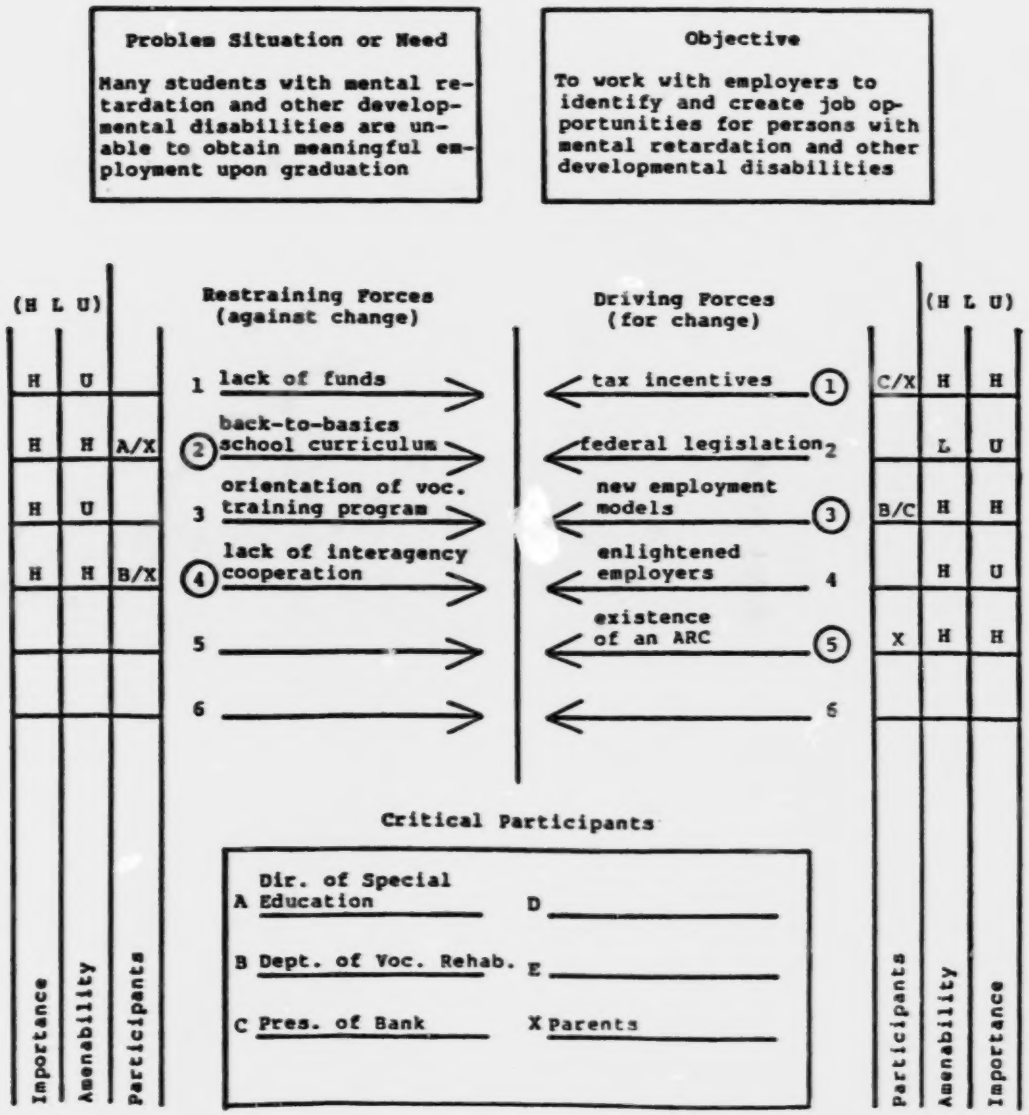
In a feasibility assessment the ARC or similar agency functions within a community. The community includes all the forces (e.g., community norms, expressed needs, political and economic pressures) which will influence the agency's implementation of TSC objectives. The following method described by Lauffer (1982) and illustrated in Exhibit 3.1 is one by which the ARC or other agency can assess the community factors which will impact upon its implementation of TSC objectives:

(1) Describe the problem or need as precisely as possible. This is the situation that needs to be changed which was identified in the needs assessment.

Example: Many students with mental retardation and other developmental disabilities leaving school are unable to obtain meaningful employment.

Exhibit 3.1

FEASIBILITY ASSESSMENT



H = high; L = low; U = uncertain

(2) Specify the objective to be reached.

Example: To work with employers for purposes of identifying and creating job opportunities for persons with mental retardation and other developmental disabilities.

(3) Identify all the restraining forces: forces that reinforce the status quo or move away from the objective.

Example: Lack of funds; back-to-basics school curriculum; vocational training programs oriented to students with less severe handicaps; lack of interagency cooperation.

(4) Identify all the driving forces: forces that alter the present condition in the desired manner.

Example: Tax incentives; federal legislation; new employment models; enlightened employers; existence of an ARC.

(5) Estimate the importance and amenability to change of each of the forces listed. Do this by designating each as H (high), L (low) or U (uncertain) in the appropriate columns to the left of restraining forces and to the right of the driving forces. Importance refers to the extent of a force's influence on maintaining the status quo, resisting change or achieving the change objective. Amenability refers to the extent of a force's potential for modification, i.e., decreased if a restraining force or increased if a driving force.

(6) Identify those forces that are considered to be working forces, because they are high on importance and amenability to change. Circle the number to the left or to the right of those forces (depending on whether they are restraining or driving forces). These are the principal forces to be modified or acted upon in a planned change effort.

Example: Back-to-basics school curriculum; lack of interagency cooperation; tax incentives; new employment models; existence of an ARC.

(7) Identify the critical participants who are best able to influence the working forces in the box below the list of forces. Then indicate by placing

a letter(s) in the appropriate column to the left of the restraining forces and to the right of the driving forces which participant(s) is most likely to be influential as regards the working forces identified.

Example: Director of Special Education;
Department of Vocational Rehabilitation;
President of Bank; ARC.

This feasibility assessment increases the knowledge of critical participants who must be involved in meeting stated TSC objectives and the working forces likely to be more important and/or amenable to change. The assessment has answered the two questions presented in the overview. Any uncertainty related to a force's importance or amenability to change should not automatically result in its exclusion. If there is a perception that this force will be critical to a successful outcome in the implementation of the objective under review, then efforts similar to those addressing the identified working forces should be adopted.

Controversy may emerge as to who should be responsible for carrying out the various TSC objectives. If there is controversy over responsibility, it should be revealed in the course of conducting a feasibility study. Successful resolution for meeting TSC objectives is specifically addressed in Chapter 5 in selecting strategies for establishing a TSC during the implementation stage.

4.0 Formation of a TSC

OVERVIEW

The organizational structure of a TSC should correspond to the functions described in Chapter 1:

(1) Assist in the location of and access to the most appropriate combination of services and resources.

(2) Systematically collect, maintain and disseminate information on services and resources.

(3) Assist in the development and support of relationships among agencies that promote coordinated services.

(4) Assist in the development of new services and programs.

A successful and comprehensive TSC, able to meet the above four functions, usually involves several agencies and organizations working together. The underlying assumption is that the delivery of comprehensive services and programs to assist students or clients with mental retardation and other developmental disabilities in the transition process requires interagency collaboration. As a consequence, such collaboration results in greater efficiency in the distribution of scarce resources and increased effectiveness in the services and programs provided.

GUIDELINES AND PROCEDURES

. choose TSC interorganizational structure
. ensure participation

A. Interorganizational Structure

In Chapter 1, it was stated that a center may be more than a centralized location where services and programs will be provided or it may be a decentralized system of agencies and organizations working together for a common purpose. It was further stated that either a local ARC, similar agency or combination of agencies will assume overall administration. The important factor is that some level of interorganizational collaboration is required among independent agencies and organizations to effectively serve the target population. Such collaboration might be completely at a local level or involve participants in a specific community with, for example, those at a regional or state level.

Two interorganizational structures, contrasted in Exhibit 4.1, are proposed for operating a TSC: (1) a formal structure, e.g., center, collaborative, system, etc.; and (2) an informal structure, e.g., coalition, task force, etc.

Under a formal TSC structure one agency is the focal or central organization. There is some formal organizing of agencies, organizations and other participants, and staffing for the accomplishment of TSC objectives. The participants, for example, may formally agree that one agency will assume full responsibility for the planning and management of a TSC. Similarly, each participant may agree on assuming major responsibility for providing other services, e.g., transportation, intake and diagnosis, case management, marketing. In addition, a majority or all participants may agree to support the establishment of a new service or program that will be shared by all. To illustrate, a sheltered workshop may wish to establish a subsidiary program which provides gardening and maintenance services on a contract basis. This employment opportunity will become a community resource for other members in the TSC to refer clients. In return, the sheltered workshop may draw upon the marketing and job development talents of other TSC members.

Decision-making in a formal structure is located with the board and administrative staff of the central organization; all final decisions, however, are subject to ratification by the participants where authority ultimately resides. There is moderate commitment to the leadership of the central organization. Although the participants are independent, they may agree to a division of labor which could affect their structure without making them departments of the TSC. Exhibit 2.5 in Chapter 2 suggests several interagency linkage mechanisms, e.g., client team, staff outstationing, which modify staff roles and responsibilities vis-a-vis staff from other participating TSC agencies without the creation of a formal department. An interagency agreement may be all that is needed.

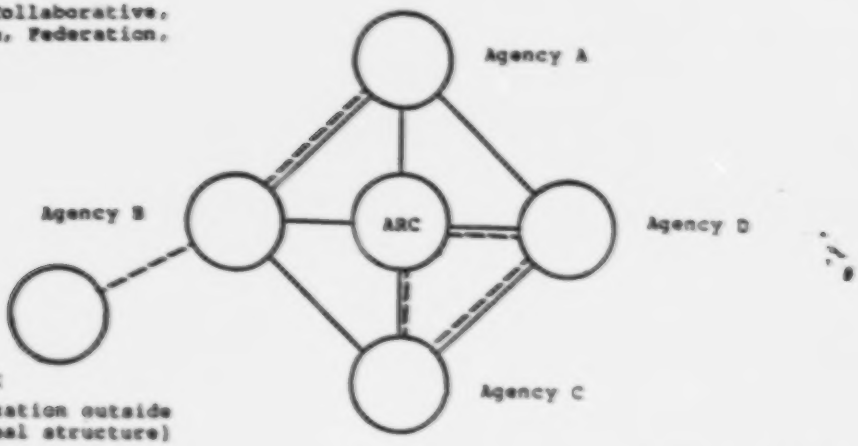
Under an informal structure, each participant, as in a formal structure, is independent and has its own set of objectives separate from the TSC's. An agency may collaborate on an ad hoc basis when there is commonality with other participants in the community on a TSC objective and, by working together, there is a greater likelihood of accomplishing it. There is no central organization nor TSC staffing. Decision-making evolves from the interaction of the agencies, organizations and other participants. No single participant has authority over another. Any ad hoc division of labor to fulfill common TSC objectives usually involves a minimum of restructuring of the cooperating participants. Agencies, for example, might form an ad hoc coalition which meets regularly prior to the state legislative session in order to develop its legislative agenda, strategies and tactics. Lastly, there are no expectations of commitment to the leadership of any single participant.

Exhibit 4.1

TSC INTERORGANIZATIONAL STRUCTURES

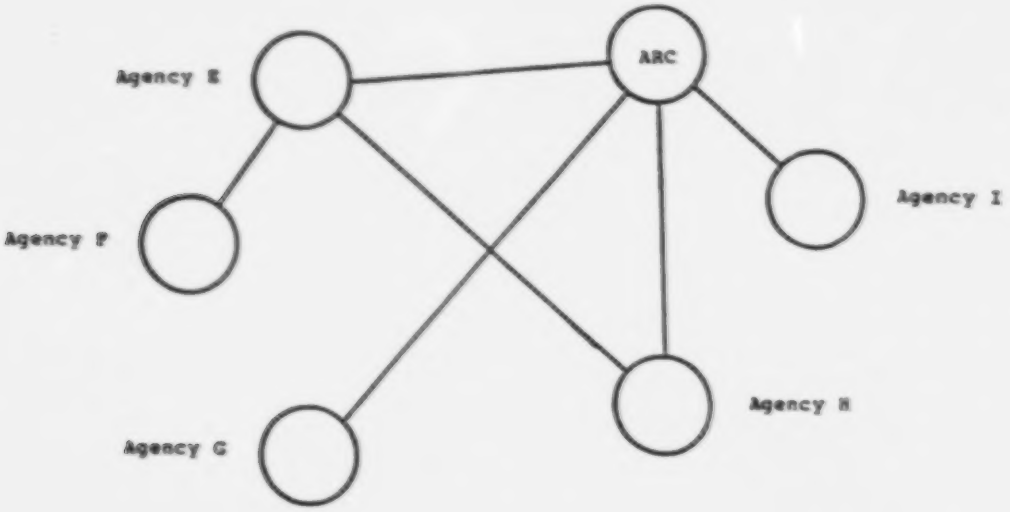
Formal Structure

(Center, Collaborative, Consortium, Federation, System)



Informal Structure

(Coalition, Task Force)



It is important to note that the need for a specific service or program may require a significant departure from the way things currently proceed among TSC participants in the more formal structure. A more advocate and less collaborative role, for example, may be required of an agency or sub-group to respond to the population-in-need. Thus, assisting in the development of a new program, e.g., supported employment, may necessitate independent action on the part of the ARC, another agency, or the development of a coalition of agencies. This informal structure might include any combination of the current agencies, organizations and other participants in the formal structure, e.g., C, D and ARC or any combination of them with others outside this TSC structure, e.g., Agencies A, B and X.

There are risks involved in initiating coalitions and task forces. Perhaps the most obvious risk is the one impacting upon the formal structure and the ability of all participants to work collaboratively in the future. The agencies, organizations and other participants demonstrating such independence must assess their ability to withstand possible opposition from others in the formal structure who might view a new program, service or organization as a threat to their respective program.

Formalized interorganizational collaboration may be established through interagency agreements described in Chapter 5. These agreements recognize the interdependence among the agencies, organizations and others, ensuring their accountability to appropriate funding sources, regulatory bodies and consumers. Roles and responsibilities of the participants are clearly defined.

B. Participants

Interagency agreements do not ensure accessibility to the board of the agency responsible for overall policy formulation and TSC decision-making. One way to ensure that policies and decisions adequately reflect the needs of the target population would be for the board to establish a formal committee on transition. If there is currently a professional advisory committee for the agency, attention should be given to expanding it to include other TSC participants; otherwise, such a committee should be developed. Representatives from the business community, for example, will ensure the inclusion of the employment sector's perspectives.

Lastly, it is imperative for the ARC and other concerned agencies to ensure that persons with mental retardation or other developmental disabilities, their families, legal guardians or advocates are represented. These individuals provide valuable knowledge and insights. Such representation should be standard practice in all agencies and organizations serving the target population.

5.0 Implementation

OVERVIEW

An implementation plan describes tasks and activities in concrete terms so that objectives will be accomplished. Up to this stage in the process of establishing a TSC, a conceptual framework highlighting four major TSC functions has been presented, needs determined, objectives formulated, feasibility assessed and an organizational structure selected under which a TSC will operate.

In the current stage in the planning process, programs are designed, agencies assigned responsibilities, tasks determined and people identified to carry them out. A formal implementation plan is written detailing the TSC objectives, strategies and assignment of responsibilities. Timelines are also assigned. The plan should be consistent with the TSC functions and written objectives.

There are numerous ways to effect the transition of students from school into employment and community living. The foundation for each student with mental retardation or other developmental disability begins with a good Individualized Education Program (IEP) mandated under P.L. 94-142. The planning of appropriate transition services and programs for these students extends beyond the school and is also addressed in other federally-mandated plans such as the Individualized Written Rehabilitation Plan (IWRP), Individualized Habilitation Plan (IHP) and the Individual Service Plan (ISP). The net result of all this planning is often fragmented. Interagency agreements are important ways to ensure a coordinated effort among the various agencies and organizations in delivering employment-related and other transition services and programs.

GUIDELINES AND PROCEDURES

- select strategies to meet objectives
- establish location of responsibility
- staffing

A. Implementation Strategies

There are three major strategies available to all TSCs in the implementation of their objectives: cooperation, campaign and contest. In the **cooperation strategy**, the TSC encounters agreement on the objective(s) and its participants work cooperatively on the objective so that their combined activity will accomplish it. In the **campaign strategy**, the TSC seeks to bring about agreement on its objective(s) with the various participants,

making a cooperative strategy possible as well as reducing the likelihood of outright opposition. The TSC may need to modify the objective; or it may need to offer inducements for cooperation so that the objective becomes acceptable on some basis other than its own merits. In the contest strategy, agencies, organizations, groups and/or individuals in the community are seeking incompatible outcomes and the TSC attempts to defeat opposition to its objective(s) (Warren, 1971).

Frequently, the implementation of a TSC objective will employ more than one strategy. A campaign strategy, for example, might be called for when an objective involves a redistribution of agency resources (e.g., funds, personnel, facilities) in order to effectively deliver services and programs to the target population. In this situation, the agency may need to campaign for the objective, drawing upon its political savvy, bargaining and negotiating talents to reach agreement among the critical participants on services and programs. At the same time, the agency may be required to engage in some level of contest and advocate for the unmet needs of the target population.

The following three TSC objectives illustrate the strategic options available to implement them.

Objective 1:

> To work with teachers and school administrators to ensure that IEPs for students with mental retardation and other developmental disabilities include objectives pertaining to vocational preparation and independent living in the community.

Strategies:

> To provide "X" seminars/workshops on supported employment models for all junior and senior high school special educators. (Campaign)
>
> To train all special education personnel in the behavioral skills needed by a person to successfully function in competitive employment programs and community living alternatives. (Cooperation)

The objective evolves from a lack of knowledge by educators in the community preparing students with mental retardation and other developmental disabilities for work. Agreement exists among educators and other critical participants in the community that something must be done in making the curriculum more relevant to increase employment opportunities and fullest integration into the community. Resources need not be redistributed among agencies to meet the objective; rather, agencies need to examine and modify their current budget utilization. The proposed strategies underscore the need for interagency cooperation.

Objective 2:

To work with parents to ensure them of their due process rights under Public Law 94-142 when the school does not provide appropriate vocational education.

Strategies:

To appeal decisions made by the school regarding the vocational education placement of students who are handicapped. (Contest)

To distribute information to parents on their child's rights under P.L. 94-142. (Campaign)

The objective is a product of the rights to minimum due process standards in evaluation, classification and educational placement of children who are handicapped. Serious disagreement is sometimes encountered between the parents of the student with mental retardation or other developmental disability and the school administration. Resources will probably need to be redistributed or new resources found for providing the additional services and programs that the school system is either unable or unwilling to provide.

Objective 3:

To work with employers for the purpose of identifying and creating job opportunities for persons with mental retardation and other developmental disabilities.

Strategies:

To educate state and local policymakers on supported employment models and the economic benefits of employing adults with mental retardation and other developmental disabilities. (Cooperation/Campaign)

To initiate a supported employment demonstration program in industry. (Campaign)

The objective is in response to the poor integration of recent graduates and adults with mental retardation and other developmental disabilities into competitive work opportunities. There is some disagreement among vocational educators, rehabilitation counselors and employers over the employment qualifications of persons with mental retardation and other developmental disabilities. Resources may need to be redistributed and new resources found to generate and disseminate information on employment models, and to promote the supported competitive work concept in a demonstration project.

In sum, strategies emphasizing collaboration should be developed with the intent of encouraging greater cooperation among

the critical participants. Strategies emphasizing negotiation, bargaining and advocacy should aim at neutralizing or winning over potential opposition to stated objectives.

B. Interagency Agreements and Transitional Planning

A successful TSC depends upon interorganizational collaboration. The decision to collaborate encourages formal and informal agreements among participants. Three classes of interagency agreements have been identified (Audette, 1980):

1. Commitments to baseline standards regarding who does what to whom, when, where, how often, under whose supervision and to whose advantage.

2. Commitments to allocation of public school and other agency resources.

3. Commitments to uniform procedures, forms, and activities by public schools and other agencies.

Exhibit 5.1 describes the essential elements in interagency agreements. Agreements may vary in the elements they contain and in their formality. At the local level, ARCs or similar agencies may be party to one or more interagency agreements with other local and/or state agencies and organizations responsible for employment-habilitation programs, community living alternatives and support services. In such agreements, the responsibilities of agencies are shaped by their current resources.

One of the essential elements in interagency agreements is developing procedures for planning the needed transition services and programs before and soon after a student leaves school. Presently, the IWRP mandated under the Rehabilitation Act of 1973 and the IEP mandated under the Education for All Handicapped Children Act of 1975, are plans responding to supportive rehabilitation services and vocational education. The IHP under the Developmental Disabilities Assistance and Bill of Rights Act and the ISP under Section 1615 of the Social Security Act, are plans addressing all service needs important to successful transition. These current individualized planning processes may yield a more effective plan with an ARC or similar agency coordinating the separate agency planning efforts into one comprehensive and integrated transition plan. The transition plan should be seen as an integral piece of the current IEP, IWRP and other plans.

Exhibit 5.1

ESSENTIAL ELEMENTS OF INTERAGENCY AGREEMENTS

1. **Definitions:** When students are evaluated to determine their service needs, the public school and other participating agencies use uniform terminology, free of jargon, on all forms to ensure a common understanding of the program requirements.

2. **Forms and formats:** When students are evaluated, reports can be made on a uniform packet of forms. For example, when screening is conducted, all basic information used by the public school and other agencies will be included in a single packet of forms, including those for general as well as specialized information.

3. **Referral:** When students are identified as needing services, a commitment is made to use a single intake system to ensure that all necessary services are provided.

4. **Entitlements:** When individual programs are designed, a commitment is made to coordinate all entitlements for services offered through various agencies.

5. **Complementarity:** When individual programs are designed, a commitment is made to ensure that services by the public school properly mesh with services from other agencies.

6. **Transitions:** When long term individual programs are planned, public schools and other agencies are committed to respond to automatic triggering mechanisms for cooperative effort. For example, the public school and the state vocational rehabilitation agency agree that when a student is evaluated for special education services a rehabilitation counselor will participate for purposes of planning programs that will be necessary when the student leaves school.

7. **Planning and budgetary calendars:** Uniform calendars for planning and budgeting can be used by participating agencies.

8. **Coordinated, comprehensive community planning:** Variously required annual and multi-year community and substate regional plans can be developed in concert so that contributions promised from the public schools and other participating agencies are included in each plan.

9. **Coordinated staff development:** Staff who offer similar services, but in different agencies, can be trained together.

10. **Fiscal administration:** Administrative arrangements can be made so that payment for services follows the student and family regardless of which agency provides services.

11. **Integrated data base:** Information that is collected by the public school and other participating agencies can be stored in a commonly controlled data system, and can be used by each agency for its own purposes or to assist another agency.

12. **Cooperative evaluations and monitoring:** Public schools and other participating agencies contribute resources to implement qualitative evaluation and compliance monitoring of their individual and coordinated services.

Source: Audette, R. (1980)

C. Staffing

Responsibilities for implementing strategies must be assigned to specific agencies, organizations, groups and individuals. These tasks, when combined, become the programs and services that move plans into practice. Exhibit 5.2 describes proposed TSC tasks. Filling any TSC position is certainly subject to the overall functions of the TSC, its specific objectives and the available manpower in a given community.

The descriptions of the agencies and organizations in the interorganizational network give some assessment of potential TSC staff. Without the infusion of new funds, the participants in a TSC may need to review and possibly redefine job descriptions of current staff, recruit volunteers, and provide internships for college and graduate students in order to meet the task responsibilities for each implementation strategy. The advocacy expertise of many ARCs and other agencies, for example, might lead them to assume greater responsibilities for TSC campaign strategies. The interagency agreements should spell out what are reasonable expectations of staff of participating agencies and organizations in collaborative TSC efforts.

While many task responsibilities in Exhibit 5.2 (e.g., enrollment, monitoring, assisting vocational placement) may be currently addressed by one or more agency or organization, it is doubtful that the determination of placement alternatives, the coordination with specialized and generic services, the advocacy for resource development, and the influencing of policy/regulation formulation are being successfully accomplished. In most communities no agency or organization is formally responsible for linking students or clients with mental retardation and other developmental disabilities with the larger service system and employment sector, even though schools sometime assume this responsibility. Operating at the systems-level within a given community may come under the domain of the TSC. A revised job description of a current ARC employee, a newly-funded position or an experienced volunteer located within the TSC is deemed crucial for accomplishing systems-level tasks and to the broader success of the TSC.

Exhibit 5.3 summarizes the elements in a TSC plan, illustrating the flow from TSC function through the formulation of objectives and implementation strategies to the assignment of task responsibilities. Only the dates to complete each task and the evaluation design need to be included to complete the implementation plan.

Exhibit 5.2

PROPOSED TSC TASKS FOR PARENTS, VOLUNTEERS AND PROFESSIONALS

Enrollment

1. Case finding
2. Certification

Monitoring

1. Maintains records
2. Information system input (computer)
3. Client progress/ movement documentation

Maintenance

1. Appointments
2. Errands
3. Correspondence
4. Recertification

Community living assistance

1. Medication
2. Clothing repair/replacement
3. Meal planning/grocery shopping
4. Crisis intervention/ emergency services
5. Money usage
6. Time awareness and utilization

Vocational placement assistance

1. Career counseling and guidance
2. Work-adjustment counseling
3. Develops and uses simulated job application and interview procedures
4. Provides and/or coordinates job placement services
5. Trains employers and supervisors to work effectively with special needs learners on-the-job

Community integration assistance

1. Recreation/leisure
2. Transportation
3. Community utilization
4. Interpersonal relations

Systems-level operation

1. Determines placement alternatives
2. Coordinates individualized transitional planning and services
3. Interfaces with generic services
4. Advocates for resource development
5. Influences formulation of policies and regulations

Adapted (with modifications) from: Schalock, R. (1985)

Exhibit 5.3

TSC IMPLEMENTATION PLAN

Function	Objective	Strategies	Assigned Task Responsibilities
(1) Assist in the location of and access to the most appropriate combination of services and resources	To work with teachers and school administrators to ensure that IEPs for students with mental retardation and other developmental disabilities include objectives pertaining to vocational preparation and independent living in the community	To provide "X" seminars/workshops on supported competitive employment models for all junior and senior high school special educators	School liaison; ARC staff members; employers
		To train all special education personnel in the behavioral skills needed to successfully function in competitive employment programs and community living alternatives.	School liaison; professors; or the-job supervisor; group home staff members
	To work with parents to ensure them of their due process rights under Public Law 94-142 where the school does not provide appropriate vocational education	To appeal decisions made by the school regarding the vocational education placement of students who are handicapped	Parents; ARC staff and members
		To distribute to parents information on their child's rights under Public Law 94-142	ARC staff member
(2) Systematically collect and maintain information on services and resources	To work with schools and service agencies to develop an information system on current programs and services for students or clients with mental retardation and other developmental disabilities	To train all information and referral personnel in schools and service agencies in the use of computerized information sytems	Computer firm; ARC staff and members
		To provide computer terminals in all schools and service agencies	Computer firm; ARC staff

	Function	Objective	Strategies	Assigned Task Responsibiliti
(3)	Assist in the development and support of relationships among agencies that promote coordination of services	To work with local schools and vocational rehabilitation agency to promote understanding and agreements which will result in improved vocational servcies for students or clients with mental retardation and other developmental disabilities	To develop interagency agreement on roles and responsibilities of school and vocational rehabilitation agency upon graduation from high school of students with mental retardation and other developmental disabilities	Superintendent; Director of Vocational Rehabilitation
			To involve vocational rehabilitation agency in a formalized transitional planning process for each student with mental retardation or other developmental disability	Director of Special Education; ARC staff; Director of Vocational Rehabilitation office
(4)	Assist in the development of new programs and services	To work with employers for purposes of identifying and creating job opportunities for persons with mental retardation and other developmental disabilities	To educate state and local policymakers and employers on supported employment models and economic benefits of employing adults with mental retardation and other developmental disabilities	Vocational educators; ARC staff members; researchers
			To initiate a supported employment project in industry	Employers; ARC staff member; Job coach

6.0 Evaluation

ERVIEW

Throughout this handbook the stages in establishing a TSC ve been referenced to its four principal functions:

(1) Assist in the location of and access to the most appropriate combination of services and resources.

(2) Systematically collect and maintain information on services and resources.

(3) Assist in the development and support of relationships among agencies that promote coordinated services.

(4) Assist in the development of new programs and services.

e proposed TSC objectives provide greater specification of ese functions. In the evaluation stage, one assesses whether e TSC objectives have been met. The information generated from aluating these objectives, and their strategies for implementaon, can be used to enhance the internal management, planning d delivery of services and programs in a TSC.

Frequently, an ARC or similar agency will be required by its rrent funding sources (e.g., federal agency, United Way) to cument the effects of its services and programs on students clients with mental retardation and other developmental sabilities. Successfully demonstrated results should lend gnificant credibility to the agency responsible for implementg the TSC objectives. The evaluation could be designed to monstrate immediate benefits to the target population. Such edibility may yield increased funds from current and new nding sources interested in one or more TSC objectives. More tended outcome evaluations are also useful to demonstrate benets over time.

Prior to evaluation, there should be agreement between the C participants and the evaluator on the TSC objectives. Otherse, the evaluation results can be legitimately questioned as ing inconclusive. Administrators, for instance, could say that e program was not designed with the evaluator's objectives in nd. Differences in political philosophies and intervention rategies among funding agencies and their recipients could ovoke staff resistance to evaluation efforts. This might lead reduction in funds, regardless of the merits of the program. cognizing such possible barriers to evaluation at the outset, d properly attending to them, should reduce many harmful fects (Weiss, 1972).

GUIDELINES AND PROCEDURES

- Select evaluator
- Construct evaluation design

A. Selecting an Evaluator

The first concern in evaluation is determining what you want to know. The second is determining how to obtain the information; that is, the evaluation design. In both instances, the presence of an evaluator will enhance the process. Should the evaluator come from within the organization or should the organization hire an external evaluator to either perform the evaluation or act as a consultant? The possibility of the organization's performing its own evaluation increases with the availability of existing evaluation instruments, and volunteers to monitor and collect information. If, however, the problem of evaluation becomes increasingly complex, it may be necessary to go outside the organization to select an evaluator. At a minimum, the evaluator should have demonstrated competence in conducting evaluations and substantive knowledge of the specific area of evaluation.

B. Evaluation Design

The design for evaluating the services and programs of a TSC includes the evaluation question, the part of the service or program to which the evaluation question refers (i.e., input, process, outcome), the information need, the source of information, and data collection and analysis (Yavorsky, undated). Exhibit 6.1 presents these elements with the exception of data collection and analysis. They correspond to several objectives and implementation strategies under the TSC function of assisting in the development of new programs and services for students or clients with mental retardation and other developmental disabilities.

The evaluation questions must encompass concrete, measurable phenomena which describe the kind of performance information sought for each TSC objective. For example, questions based upon the TSC objective of working with employers for purposes of identifying and creating job opportunities for persons with mental retardation and other developmental disabilities might include:

(1) At the input level: how many and what type of educational programs have been initiated for state and local policymakers and employers on supported employment models and the economic

Exhibit 6.1

TSC EVALUATION DESIGN

TSC Function: Assist in the development of new programs and services for students or clients with mental retardation and other developmental disabilities

Objective	Strategies	Evaluation Questions	Information Need	Source of Information
To create job opportunities for persons with mental retardation and other developmental disabilities.	To educate state and local policymakers and employers on supported employment models and the economic benefits of employing adults with mental retardation and other developmental disabilities.	Input: How many and what types of educational programs have been initiated for state and local policymakers and employers on supported employment models, and the economic benefits of employing the target population? Process: Do employers utilize knowledge obtained on tax incentives when developing new jobs? Outcome: Have employment opportunities increased after state and local policymakers and employers experienced an educational program?	The program planners have agreed that educating state and local policymakers and employers is a necessity for increasing job opportunities. The information needed is that information which provide evidence that individuals attending educational programs understand the material presented; that employers use the tax incentives in developing new jobs; that employers hire persons with mental retardation and other developmental disabilities; and policymakers work to continue these tax incentives. The TSC staff will utilize this information to improve the design and content of the educational program.	Direct observation by the evaluator; survey of state and local policymakers and employers; records of attendance at educational programs; voting records; employment statistics.
To work with students or clients for purposes of increasing job opportunities	To train clients in job search skills	Input: How many and what types of job search training programs have been initiated for clients? Process: Do clients utilize job search skills when searching for jobs? Outcome: Do clients have a higher rate of employment after utilizing this training program?	The program planners have agreed that improved job search skills is a necessity for client employability. The information needed is that information which will indicate the number and type of job search training programs provided; the clients in attendance; what job search skills taught are used by clients; the employment rate of these clients. The TSC staff will utilize this information to determine which job search training programs to continue.	Direct observation by the evaluator; employment records; report of the trainers

benefits of employing the target population?

(2) At the **process** level: do employers utilize knowledge obtained on tax incentives when developing new jobs?

(3) At the **outcome** level: have employment opportunities increased after the state and local policymakers and employers experienced an educational program?

Input refers to the amount and distribution of resources; process refers to how these resources are utilized; and outcome refers to the extent of service or program effectiveness. In the above examples, reference is being made to an educational program at the input level; utilization of knowledge at the process level; and employment opportunities at the outcome level.

Frequently, the student or client will be the focal point at the input, process and outcome levels of evaluation. For example, the objective of working with students or clients for the purpose of increasing job opportunities may be refined into a strategy which trains clients in job search skills. The evaluation questions asked might include:

(1) At the **input** level: how many and what type of programs pertaining to job search skills have been initiated for clients?

(2) At the **process** level: do clients utilize job search skills when searching for jobs?

(3) At the **outcome** level: do clients have a higher rate of employment after utilizing this program?

In order to justify an evaluation question, the information need is described. It includes a rationale for the question, types of information needed to answer the question and how the information will be used. The documentation is illustrated with the first objective - to work with employers for purposes of identifying and creating job opportunities for persons with mental retardation and other developmental disabilities:

(1) **Rationale for the question:** the program planners have agreed that educating state and local policymakers and employers is necessary for increasing job opportunities.

(2) **Types of information needed:** the information needed is that information which will provide evidence that individuals attending educational programs understand the material presented; that employers use the tax incentives in developing

new jobs; that employers hire persons with mental retardation and other developmental disabilities; and that policymakers work to continue these tax incentives.

(3) **Method of utilization:** the TSC staff will utilize this information to improve the design and content of the educational program.

A listing of the sources of information acts as a guideline for a realistic approach to evaluation. In the first example presented above, the information may be obtained through such sources as direct observation by the evaluator, survey of legislators and employers, records of attendance at educational programs, etc. If the source of information is unavailable due to cost or inaccessibility, the evaluation question must be modified or discarded.

The final aspect of the evaluation design is information collection and analysis. The ARC or similar agency should assume responsibility for coordinating the collection of data. This responsibility assists in completing one of the four TSC functions: systematically collect and maintain information on services and resources available to meet the needs of students or clients with mental retardation and other developmental disabilities. The evaluation supplements the information collected during the needs assessment and may result in a revision of the TSC objectives. Simple descriptive analysis (e.g., tabulations, frequencies, correlations) can be completed by staff or members of an agency and used to answer many evaluation questions. The type of evaluation questions which have been presented here are within the capabilities of most ARCs or similar agencies. The findings can influence moderate changes in the operations of a TSC.

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Appendix A

TRANSITIONAL SERVICE CENTERS

Chapter	Executive Director	President
ARC-Philadelphia 2350 W.Westmoreland Philadelphia, PA 19140 215/229-4550	E. A. Gentile	George Horowitz
Charles River ARC E. Militia Heights P.O. Box 169 Needham, MA 02192 617/444-4347	Paul D. Merritt	George Smith
ARC of South Middlesex 705 Waverly Street Framingham, MA 01701 617/879-6364	William H. Garr	Cheryl L. Smith
South Shore ARC 371 River Street Box 58 North Weymouth, MA 02191 617/335-3023	Leo V. Sarkissian	Maria Plante
ARC-Wake County 1100 Wake Forest Road Raleigh, NC 27604 919/832-2660	Sherry Grant	Jo Hughes
Macon-Bibb ARC 4664 Sheraton Drive Macon, GA 31210 912/477-4473	Helen Glawson	T. Lynn Davis III
Multi-County collaborative effort including:		
ARC of Ottawa County 246 S. River Avenue Holland, MI 49423 616/396-1201	Steve Redmond	Lynn Ihrman
ARC of Kent County 1331 Lake Drive, S.E. Grand Rapids, MI 49506 616/459-3339	Andrew E. Sugar	Matthew P. Woudenberg
ARC of Allegan County P.O. Box 32 Allegan, MI 49010 616/673-8841		Robin Melvin

TRANSITIONAL SERVICE CENTERS

Chapter	Executive Director	President
ARC-Richardson P.O. Box 830953 Richardson, TX 75083 214/644-1644		Sharon Bush
ARC-Pierce County 402 Tacoma Ave., South Suite 100 Tacoma, WA 98402 206/383-2643	Stan Baxter	Annette Schuchmann-Bishop
Opportunity Village ARC 307 West Charleston Blvd. Las Vegas, NV 89102 702/384-8170	Gerald J. Allen	Steve Miller

Appendix B

ARC POSITION STATEMENTS

Position re: Productivity

The ARC believes that the vast majority of persons who are mentally retarded have the capability, or can be prepared, to enter the competitive labor market or to perform in well-paid sheltered work situations, earning at least the minimum wage. Adults with mental retardation must be provided the opportunity to receive appropriate vocational training, to receive assistance in securing appropriate employment and to participate in real work.

Movement into more work-oriented programs should be an on-going goal. In this regard, the ARC believes that vocational programs must be planned and conducted in a manner consistent with the jobs that exist in the community as well as those that are likely to be available in the future.

Incentives should be provided to employers who offer employment opportunities to persons with mental retardation. Examples of incentives are reimbursement or tax deductions to employers for excess costs in initial employment, on-the-job training, or adaptation of the job or work place.

The ARC supports the concepts of work stations in industry. The developers of work stations in industry attest to the importance of built-in normal setting expectations and the crucial role of non-handicapped individuals as "model workers." Also essential are appropriate training technology, job analysis, and adaptive devices for workers who find learning job tasks more difficult when customary methods are used.

The ARC strongly encourages the use of high technology to increase employment opportunities for adults who are mentally retarded through the adaptation of machinery, job redesign and the control of health and safety factors. Employment opportunities for persons who are mentally retarded can be greatly increased if emphasis is placed on wide dissemination and utilization of new technology in both competitive and sheltered settings.

Work-ready persons who are mentally retarded should not be denied access to government-sponsored employment and job programs simply because they are mentally retarded. Government-sponsored work retraining programs should be open to individuals who are mentally retarded who are otherwise capable of working.

Position re: The Role of Work Activity Centers and Regular Workshops in Vocational Training

Regardless of the severity of the handicapping condition, all persons who are mentally retarded should be provided the opportunity for work related training. Individuals who are mentally retarded should enter the training program most suited to their needs.

Workshops should develop a wide variety of training and work opportunities to maximize work skills, pay and placement in outside employment. Transitional training programs or extended sheltered employment in workshops should be designed to offer a wide variety of tasks and opportunities and systematic advancement from simple to complex job situations.

Existing practice (regulations) should be modified to permit employees in work activity centers to be integrated with employees in regular workshops to enhance opportunities for increased productivity of both groups. Attitudes and program approaches have shifted to the point where requiring segregation of workers into separate activity centers and regular workshops is neither justifiable on programmatic grounds nor practical on grounds of efficient use of resources. Whatever the setting, individuals with mental retardation should receive vocational and other habilitative services based on their individual needs. They should be able to participate in a common program without segregating lower producing from higher producing workers.

Services should be provided which emphasize training for work to increase productivity of all individuals with mental retardation. These individuals should receive vocational training that prepares them for jobs that will be available following the training. Placements should be selectively based on an individual's projected capabilities, not on what job happens to be most available.

Workshop managers who lack business skills should have available to them consultation and training to develop improved business and production methods. Any business competing in the open market must maintain the technology necessary for efficient operations and productivity.

Position re: Wages

The ARC believes that adequate safeguards, including standards and enforcement procedures, should be established and implemented to protect sheltered workshop employees from economic exploitation. Wages must be commensurate with those paid for similar work performed by non-disabled workers. To this end, workshops must submit to periodic outside evaluations. The periodic reviews should ensure that piece rates are based on reasonable production standards, hourly rates are based on adequate production evaluations, and prevailing wage rates are adequately documented.

The Department of Labor should review its special exemption olicies to ascertain if disincentives exist which prevent work- s from increasing their productivity.

Persons whose productivity, after completing training and ing given appropriate supports and accommodations, is not suf- cient to justify a competitive living wage, should have their comes supplemented through the income maintenance and associ- ed health care systems. Financial supplementation should be ovided in a manner that rewards efforts to work and encourage hievement. The Department of Health and Human Services should view its relevant programs (e.g., the various titles within the cial Security Act) to ascertain if those programs create disin- ntives for persons with mental retardation for full employment portunities.

Appendix C

MAJOR FUNDING PROGRAMS FOR ADULTS WITH DEVELOPMENTAL DISABILITIES

Supplemental Security Income (SSI)

Title XVI of the Social Security Act, as amended in 1974, authorizes Supplemental Security Income (SSI), a need-based program for the blind, aged or disabled. Disability is defined as a physical or mental impairment which prevents a person from doing any substantial gainful activity and is expected to last for a continuous period of at least 12 months or result in death. In addition to the presence of a disabling condition, an individual has to show low income and possess few assets to quality for benefits. States may elect to supplement the basic Federal SSI payment. Under Section 1615 of the Act, adult beneficiaries under age 65 must be referred to the state vocational rehabilitation agency.

Social Security Disability Insurance (SSDI)

Section 202(d) of Title II of the Social Security Act of 1935 (as amended in 1956 and 1971) provides Social Security benefits to the children of workers who either are receiving Social Security retirement or disability insurance benefits or died and were insured for Social Security benefits at the time of death. After these children become age 18, they can receive benefits as adult disabled children if they are under a disability which began before age 22.

Section 222 of the Act requires that all individuals who are entitled as adult disabled children to be referred to the state vocational rehabilitation agency. In addition, this section of the statute authorizes the transfer of funds from the Disability Trust Fund to state vocational rehabilitation agencies in order to reimburse such agencies for the provision of certain rehabilitation services provided to disabled Title II beneficiaries.

Grants to States for Medical Assistance (Medicaid)

The 1965 amendments to the Social Security Act authorized grants-in-aid to states for the establishment of Medical Assistance (Medicaid) programs. Eligibility is based on financial need. Handicapped individuals may be eligible, if they meet the following criteria: (1) Categorically needy. States must cover a) all persons receiving cash benefits under Title IV-A of the Act (Supplemental Security Income) or at least, those who meet additional, more restrictive Medicaid-eligible conditions set by the particular state; (2) Medically needy. In addition, states may elect to cover certain groups of people who have higher incomes, but still cannot afford needed medical assistance. A

separate income level is established for these groups. The Federal share of reimbursable costs ranges from 50 to 78 percent, according to a formula which takes into account the state's per capita income.

- **Intermediate Care Facilities for the Mentally Retarded (ICF/MR)**

  In 1971, amendments to Title XIX (P.L. 92-223) authorized Medicaid reimbursement for intermediate care facilities (ICF). Public institutions for the mentally retarded can be certified as ICFs if (1) the primary purpose of the institution, or distinct part thereof, is the provision of health or rehabilitation services to the mentally retarded; (2) institutional residents participating in the program are receiving "active treatment"; (3) the facility is in compliance with HHS standards; and (4) states are maintaining their prior level of state-local fiscal support for facilities certified as ICF/MRs.

- **Community-Based Care Waivers**

  The Omnibus Budget Reconciliation Act of 1981 (P.L. 97-35) added a new provision to Title XIX of the Social Security Act (Section 1915(c)), granting the Secretary of Health and Human Services authority to approve home and community-based care waivers.

  These waivers permit states to finance, through the federal-state Medicaid program, non-institutional services for elderly and disabled persons who otherwise would require institutional care.

Social Security Disability Amendments of 1980 (Public Law 96-265)

Section 201(a) of P.L. 96-265 adds Section 1619 to Title XVI of the Social Security Act, providing "Benefits for Individuals Who Perform Substantial Gainful Activity Despite Severe Medical Impairment". The purpose of Section 1619(a) is to protect and continue the SSI benefits portion of the total income of that disabled recipient whose work earnings would normally cancel out basic SSI benefits, even though he or she remains severely impaired. Without this protection, a recipient would lose benefits the month after the second month of earning at the SGA level. Instead, 1619(a) continues the SSI benefits as an incentive for the recipient to continue working. Benefits are paid on the basis of a formula until earnings reach $713 per month for an eligible individual and $1,029 per month for an eligible couple (1984 levels). At that "breakeven" point, all SSI benefits cease. People who receive the special benefits continue to be eligible for Medicaid on the same basis as regular SSI recipients. States have the option of supplementing the federal benefit standard.

Under 1619(b), a blind or disabled person continues to be eligible for Medicaid even if his or her income is at or above the "breakeven" point (and he or she is no longer getting SSI benefits), if it is determined under regulations that the person (1) would be seriously inhibited in continuing employment through loss of Medicaid eligibility, and (2) does not have earnings high enough to allow him or her to provide a reasonable equivalent of the SSI benefits and Medicaid he or she would have in the absence of earnings.

Section 505 of P.L. 96-265 directs the Secretary of DHHS to develop and carry out experimental projects designed to determine a more effective way of (a) encouraging SSDI disabled beneficiaries to return to work and leave the benefit rolls, and (b) improving administration of the SSI program. For example, such experimental projects might include a) permitting some benefits even when earnings exceed the "substantial gainful activity" limit; b) extending the benefit eligibility period that follows 9 months of trial work, perhaps coupled with benefit reductions related to earnings; c) extending Medicare entitlement for severely impaired beneficiaries who return to work, even though they may no longer be entitled to monthly cash benefits; d) altering the initial 24-month waiting period for Medicare entitlements; and e) stimulating new forms of rehabilitation.

Final regulations for Section 505(b) published in the Federal Register (Vol 48, No. 37) on 23 February, 1983, also include an amendment to the Code of Federal Regulations providing that "If, as a result of participation in a project under this section, a project participant becomes ineligible for Medicaid benefits, the Secretary shall make arrangements to extend Medicaid coverage to such participant and shall reimbuse the states for any additional expenses incurred due to such continued participation."

Title XX of the Social Security Act

Title XX of the Social Security Act authorizes block grants to help states provide a broad range of social services to recipients of public assistance and other low-income individuals and families, including the handicapped. In particular, Title XX enables states to a) help individuals achieve or maintain economic self-support, thereby preventing, reducing or eliminating dependency; b) help individuals achieve or maintain self-sufficiency; c) prevent or remedy neglect, abuse, or exploitation of children and adults unable to protect their own interests; d) preserve, rehabilitate or reunite families; e) prevent or reduce inappropriate institutional care by providing for community-based care, home-based care, or other forms of less intensive care; f) secure referral or admission to institutional care when other forms of care are not appropriate; or g) provide services to individuals in institutions.

Title XX funds also can be used for a) training workers directly responsible for the provision of social services funded under the act and b) educational institutions preparing students for social services employment.

Developmental Disabilities Assistance and Bill of Rights Act (1970) (Public Law 91-517)

The Developmental Disabilities Assistance and Bill of Rights Act authorizes grant support for planning, coordinating and delivering specialized services to persons with developmental disabilities. The specific purposes of this title are (a) to assist in the provision of comprehensive services to persons with developmental disabilities, with priority to those persons whose needs cannot be covered or otherwise met under the Education for All Handicapped Children Act, the Rehabilitation Act of 1978, or other health, education, or welfare programs;(b) to assist States in appropriate planning activities; (c) to make grants to States and public and private, nonprofit agencies to establish model programs, to demonstrate innovative habilitation techniques, and to train professional and paraprofessional personnel with respect to providing services to persons with developmental disabilities; (d) to make grants to university affiliated facilities to assist them in administering and operating demonstration facilities for the provision of services to persons with developmental disabilities, and interdisciplinary training programs for personnel needed to provide specialized services for these persons; and (e) to make grants to support a system in each State to protect the legal and human rights of all persons with developmental disabilities.

Rehabilitation Act of 1973 (Public Law 93-112)

The Rehabilitation Act of 1973, as amended, authorizes Federal support for training and placing mentally and physically handicapped persons into remunerative employment. The Act defines the term "handicapped individual" to mean "any individual who (1) has a physical or mental disability which for such individual constitutes or results in a substantial handicap to employment; and (2) can reasonably be expected to benefit from vocational rehabilitation services provided."

Title I of the Act authorizes formula grants to designated state vocational rehabilitation agencies to provide basic rehabilitation services such as counseling, referral, training, physical and mental restoration services, transportation, placement, and income maintenance during the rehabilitation period. State vocational rehabilitation agencies are directed to give priority to serving "those individuals with the most severe handicaps."

For each individual served, state agencies must design an individualized written rehabilitation program (IWRP), jointly developed by the rehabilitation counselor and handicapped individual. FY 1980 appropriations for the developmentally disabled were $110 million.

Title VI of the Act establishes three special programs aimed at enhancing employment opportunities for handicapped persons: (1) The Community Services Employment Pilot Program provides community employment to handicapped persons referred by state vocational rehabilitation agencies. (2) Projects with industry enables the Federal Government to enter into agreements with individual employers and others to establish jointly financed projects that deliver training and employment services to physically and mentally handicapped persons in a realistic work setting. (3) Section 622 established a program to expand opportunities for handicapped persons to open small businesses.

Part A of Title VII authorizes formula grants to state vocational rehabilitation agencies for the provision of independent living services (counseling, housing, transportation, job placements, etc.), with priority given to disabled persons not currently served by other programs under the Rehabilitation or Developmental Disabilities Act. Part B authorizes RSA to make grants to vocational rehabilitation agencies to establish and operate centers for independent living.

Education for all Handicapped Children Act of 1975 (Public Law 94-142)

The Education for all Handicapped Children Act of 1975 requires participating states to furnish all handicapped children with a free, appropriate public education in the least restrictive setting. In addition to formula grants to the states, the legislation authorizes an array of discretionary grant programs aimed at stimulating improvements in educational services for handicapped children. Included are grant programs designed to promote the recruitment and training of special education personnel, the conduct of research and demonstration projects, and the development and dissemination of instructional materials.

Targeted Jobs Tax Credit (TJTC)

The Targeted Jobs Tax Credit (authorized by the Internal Revenue Code of 1954, Economic Recovery Tax Act of 1981, and Tax Equity and Fiscal Responsibility Act of 1982) is an elective income tax credit that can be applied to the wages private employers pay to ten targeted groups of employees including 1) SSI recipients; 2) general assistance recipients; 3) handicapped persons referred by state vocational rehabilitation or Veterans Administration programs; 4) 18 to 24 year-olds from economically disadvantaged families; 5) economically disadvantaged Vietnam-era veterans; 6) 16-19 year-olds from economically disadvantaged families who participate in a qualified cooperative education program; 7) economically-disadvantaged ex-offenders; 8) recip-

ients of Aid to Families with Dependent Children (AFDC) and participants in the Work Incentive (WIN) program; 9) involuntarily terminated CETA employees hired before January 1, 1983; and 10) economically disadvantaged 16-17 year old new summer youth employees.

Except in the case of economically disadvantaged summer youth employees (for whom the credit is 85 percent of up to $3,000) the credit is 50 percent of first year wages up to $6,000 per employee and 25 percent of second year wages up to $6,000.

Job Training Partnership Act of 1982
(Public Law 97-300)

The Job Training Partnership Act (JTPA) authorizes job preparation and job training for people who are economically disadvantaged and for people who face serious barriers to employment. Emphasis is placed on the achievement of goals to increase the employment of participants and to reduce dependency.

Under the JTPA Act, funds go from the Federal government to the Governors of each state. Each Governor appoints a State Job Training Coordinating Council to propose designated Service Delivery Areas (SDA) for the dispersal of all funds, including discretionary funds. The chief locally elected officials in each SDA consider nominations from various agencies in the SDA and then appoint a Private Industry Council (PIC) to develop a job training plan for spending the JTPA funds.

Under JTPA individuals with handicaps are required to meet income eligibility criteria in order to be eligible for services and this factor has limited the participation of individuals in the program. However, this eligibility requirement may be waived by considering an individual with a handicap as a "family of one" even when he/she is living with a family whose income exceeds the designated guidelines. In this case, only the individual's income would be considered in determining eligibility. The income eligibility criteria can also be waived when up to 10 percent of the program participants in a service delivery area may be individuals who are not economically disadvantaged but have a barrier to employment such as physical or mental handicap.

JTPA has given the business community greater responsibility in designing and operating the program. A majority of the membership and the chairperson of each SDA's Private Industry Council (PIC) must represent business and industry. Furthermore, rehabilitation agencies and community-based organizations are specifically mentioned for membership on the PICs and on the State Job Training Coordinating Councils. Representation of education and rehabililtation agencies are required on the PICs.

In evaluating the impact of JTPA the President's Committee on Employment of the Handicapped and a project at the University of Wisconsin have found evidence that participation of individuals with disabilities in JTPA has been quite restricted. This

may be due in part to the fact that PICs are not required to detail the procedures necessary to meet the employment needs of persons with handicaps. On the other hand, PICs are required to establish performance standards which become the criteria used in program evaluation. The standards are often rigid, failing to recognize the unique needs of individuals with handicaps. This can lead to a "creaming effect" in the selection of participants.

Source: Whitehead, C. **Guidelines for evaluating, reviewing and enhancing employment-related services for people with developmental disabilities.** Washington, D.C.: National Association of Developmental Disabilities Councils, 1985.

Appendix D

SUPPORTED EMPLOYMENT INITIATIVE OF FEDERAL GOVERNMENT

Interagency Agreement Between
The Office of Special Education and Rehabilitative Services
And the Office of Human Development Services

A. Purpose

The purpose of this interagency agreement is to expand employment opportunities for persons with disabilities.

B. Background

The Department of Education received a $4.2 million FY 1985 appropriation from Congress to implement a supported employment initiative under Section 311(a)(1) of the Rehabilitation Act of 1973, as amended. This initiative seeks to stimulate the development and provision of supported work for persons with severe disabilities on a Statewide basis. The Office of Special Education and Rehabilitative Services (OSERS) will be issuing regulations and a program announcement to open competition for approximately 8-10 grants. The grant period is expected to be five years.

The Development Disabilities Act of 1984 (P.L. 98-527) recognizes the importance of employment as a means of achieving independence, productivity and integration into the community by persons with developmental disabilities. "Employment-Related Activities" was added to the Act as a mandated service priority area including transitional employment and supported work activities.

The OSERS Supported Work Initiative is closely related to HDS' initiative to expand private sector employment opportunities for persons with developmental disabilities. Supported employment is defined as paid work in a variety of integrated settings, particularly regular worksites, especially designed for severely handicapped individuals, irrespective of age or vocational potential:

- For whom competitive employment at or above the minimum wage has not traditionally occurred; and
- Who, because of their disability, need intensive ongoing post-employment support to perform in a work setting.

The concept of "supported work" encompasses a broad continuum of support options and complements strongly HDS/ADD's efforts to expand competitive employment opportunities for severely disabled individuals.

C. Specific Objectives

The objective of the agreement is to combine the financial and programmatic resources of OHDS/ADD and OSERS in implementing the Supported Employment Initiative. HDS, in entering into this agreement seeks to:

- o Strengthen coordination with OSERS around our joint commitment to meaningful, paid work for persons with severe disabilities;
- o Ensure a broad view of supported employment to include unsubsidized employment in a competitive setting with appropriate ongoing support;
- o Develop statewide supported employment models to assist State Developmental Disabilities Councils to implement their legislative mandate to be engaged in employment-related activities by Fiscal Year 1987; and
- o Evaluate the financial and programmatic impact of converting existing programs to supported work programs.

OSERS, in entering into this agreement, seeks to:

- o Strengthen cooperative efforts with HDS'/ADD's initiative to expand private sector opportunities for persons with developmental disabilities by assisting States in the redirection of services for severely disabled individuals from existing programs to supported employment programs;
- o Assure broad interagency coordination in the development and expansion of opportunities for unsubsidized employment in a competitive setting with appropriate ongoing support for severely disabled individuals; and
- o Evaluate the benefits from the establishment of statewide supported employment programs.

D. Strategy and Major Activities

OSERS will publish a program announcement for the Supported Employment Initiative in late spring of 1985. Major activities will include finalization of the program announcement, review and selection of grantees, program monitoring and technical assistance, and program evaluation. First year grants will be awarded during the summer of 1985. Evaluation questions to be addressed during the course of the initiative will include:

- o Can States convert existing programs to supported employment programs?

- o Are there greater benefits from supported employment services than from existing programs?

- o What impact does conversion to supported employment have on public cost of services?

- o What factors influence the success of supported employment programs?

E. Roles and Responsibilities

- o OSERS will carry out the following roles as co-director in this agreement:

  -- Issuing necessary regulations and publishing the program announcement;

  -- Managing selection of grantees;

  -- Awarding and administering the supported employment grants;

  -- Monitoring grantees and providing technical assistance; and

  -- Involving HDS/ADD in all aspects of the initiative and providing copies of applications, progress reports and site visit reports to HDS/ADD.

- o HDS/ADD will carry out the following roles as co-director of this initiative:

  -- Full involvement in grantee selection including co-approval of grantees;

  -- Monitoring grantees and providing technical assistance; and

  -- Involving OSERS in all HDS/ADD activities involving supported work including sharing copies of relevant reports (e.g., site visit reports).

- o OSERS and HDS/ADD will jointly review the progress of the initiative annually.

- o. Project Officers for the agreement are:

  OHDS: Casimer Wichlacz
  Deputy Commissioner, Administration on Developmental Disabilities
  245-2890

OSERS: Jim Moss, Associate Commissioner
for Program Development
Rehabilitative Services Administration
732-1287

F. Resources Needed

- o OSERS will contribute $4.2 million in FY 1985
- o OHDS will transfer $500,000 to OSERS in FY 1985.

G. Duration of Agreement

This agreement will remain in effect for five years or until activities are completed, until amended by mutual consent, or until terminated by either party upon 30 days written notice. Participation in future years is contingent upon yearly assessment of activities and upon availability of funds.

H. Authority

This agreement is entered into under the authority of the Economy Act of June 30, 1932, Section 601 (31 USC 6866), and under the provisions of general and pertinent regulations of the Comptroller General.

Approved:

Madeleine Will
Assistant Secretary
Office of Special Education
Education and Rehabilitative
Services
Department of Education

Date: 5-1-85

Approved:

Dorcas R. Hardy
Assistant Secretary for
Human Development Services
Department of Health and
Human Services

Date: MAY 1 1985

Approved:

Jean K. Elder, Commissioner
Administration on Developmental
Disabilities

Date: 5-1-85

Transitional Service Centers

Assisting Students With Developmental Disabilities into Employment and Community Life: A Workshop Trainer's Guide

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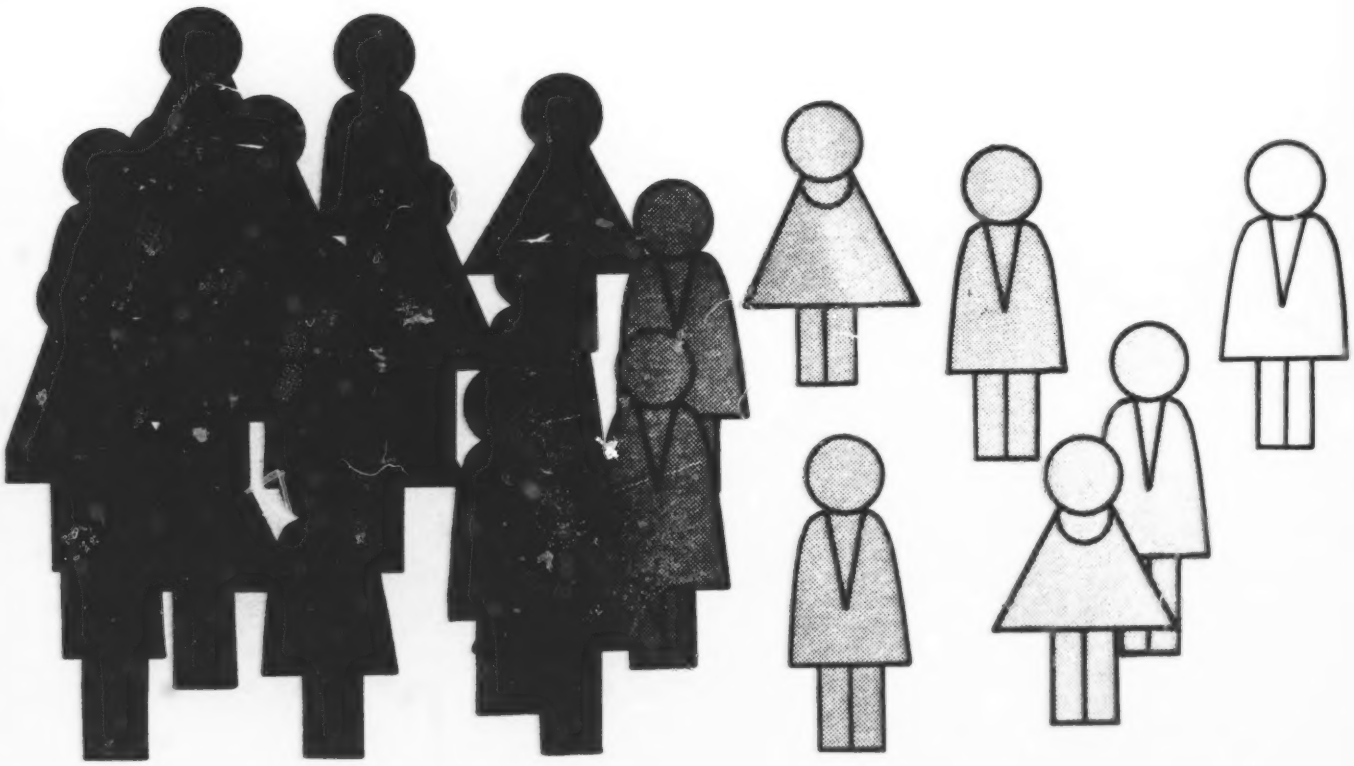

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Association for Retarded Citizens

Transitional Service Centers

Assisting Students With Developmental Disabilities into Employment and Community Life: A Workshop Trainer's Guide

Prepared by

Association for Retarded Citizens of the United States

Jeffrey B. Schwamm, Ph.D., Project Director

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1986

ARC of the United States 2501 Avenue J Arlington, Texas 76006

A Workshop Trainer's Guide

roduction

This trainer's guide was written in conjunction with a cedural handbook to assist local Associations for Retarded izens and other agencies and groups serving persons with elopmental disabilities in developing Transitional Service ters. These TSCs will assist students or clients with mental ardation and other developmental disabilities into employment community life through referral, coordination and initiation employment opportunities and transition programs and services. guide may be used in conducting a one-day workshop. It ludes suggested exercises, transparencies (or charts) and douts more fully described in the handbook. Feel free to ine these resources to meet the unique needs of your commun- Experience in conducting the workshop has indicated that it be successfully conducted with as many as forty participants.

ectives of the Workshop:

To introduce participants to the problems and issues of transition from school to work and community life

To prepare participants to establish a TSC

- determine need
- formulate and assess feasibility of TSC objectives
- form a TSC
- implement TSC objectives
- evaluate a TSC

To evaluate the training curriculum

rning Methods:

- lecture
- discussion
- brainstorming
- problem-solving

Trainer Skills:

- adult education and training methodology
- group process
- familiarity with subject

Resource Material:

Schwamm, J.B., **Transitional service centers. Assisting students with developmental disabilities into employment and community life: A procedural handbook.** Arlington, TX: Association for Retarded Citizens of the United States, 1985.

Morning Session - Three hours

30 minutes - introductions; familiarize participants with workshop objectives, agenda and trainer; participants are given an opportunity to share their individual experiences and beliefs regarding the main theme of the workshop.

30 minutes - introduce participants to the problems and issues of transition; emphasis is given to the definition of transition, purpose of, and stages in planning a TSC.

45 minutes - present the participants with the guidelines and procedures for determining the population-in-need (i.e., target population) and its needs; participants are introduced to an exercise for identifying the interorganizational network and a survey instrument for describing individual organizations, agencies and employment opportunities in the network.

45 minutes - present, or develop with the participants, possible TSC objectives; guidelines and procedures are introduced and applied for assessing the feasibility of these objectives.

15 minutes - break

15 minutes - discussion/workshop evaluation

Afternoon Session - Three hours

45 minutes - present the participants with the guidelines and procedures for forming a TSC; emphasis will concentrate on the formal and informal interorganizational frameworks which an ARC or another agency could adopt, and formal participation in a TSC.

105 minutes - present the participants with the guidelines and procedures for implementing TSC objectives; participants will be introduced to implementation strategies, essential elements of both interagency agreements and individualized transition plans, and a proposed TSC staffing pattern; emphasis will be devoted to a small group exercise for preparing an implementation plan.

15 minutes (optional) - familiarize the participants with guidelines and procedures for conducting evaluations which will include a description of the evaluation design.

15 minutes - break

15 minutes - workshop evaluation/wrap-up

Morning Session

Activity 1: WORKSHOP OBJECTIVES, AGENDA AND TRAINER (30 minutes)

- introduce trainer
- discuss transition
- introduce participants
- review objectives, agenda and distributed material

The trainer begins by introducing him or herself with appropriate background information on one's training and experience.

Participants discuss a prepared question in clusters of three to five persons and then with the entire group. They introduce themselves to members in their cluster and later to the entire group. One possible question which might be examined is: From your personal or professional vantage point, what do you want special educators, adult service providers, employers and

other community members to know regarding the transition of students or clients with mental retardation and other developmental disabilities into work and the community? Another question might be: What do you consider to be the major problems of transition from school to adult life for students or clients with mental retardation and other developmental disabilities? In the subsequent discussion, the trainer may wish to present responses of self-advocates at a 1984 conference sponsored by the Maryland State Planning Council on Developmental Disabilities (transparencies #1, #2 and #3). A comparison of the responses establishes a workshop climate that acknowledges, and is responsive to the perspectives of the workshop participants and persons with developmental disabilities.

Workshop objectives, agenda and contents of any distributed packets are reviewed.

Activity 2: INTRODUCTION TO THE PROBLEM AND ISSUES OF TRANSITION (30 Minutes)

- present overview to workshop theme
- define transition
- describe TSC functions
- review stages in establishing a TSC
- review standards for TSC services and programs

A formal presentation by the trainer or other knowledgeable person focuses on such themes as the barriers to employment for the target population, the federal, state and local policy, planning and program initiatives, the supported employment models around the country, the operational definition of transition, the functions of a TSC, the stages in establishing a TSC and lastly, TSC service and program qualities. Transparencies #4 and #5, transparencies/handouts #6 and #7, and transparency #8 are to be used for this lecture. The trainer should illustrate key points with examples from the community in which the workshop is being conducted.

Activity 3: DETERMINATION OF NEED (45 minutes)

- collect and analyze needs assessment data
- determine the target population and its needs
- identify the interorganizational network
- describe the organizations in the network

Participants are introduced to the types and sources of information that are available to determine the population-in-need, its characteristics and needs, and the gaps in employment opportunities, transition services and programs.

The population-in-need is determined, in part, through data collected by other agencies and organizations (e.g., schools, adult developmental disabilities agencies). This information is found in the descriptions of each agency and organization in the interorganizational network. Transparencies #9 and #10 are used to illustrate how to increase accuracy in determining the actual need of the target population in relation to its work and community environments. In clusters or collaboratively, participants will complete a behavioral skills assessment for a supported employment setting (transparency/handout #11). Special aids or environmental modifications that eliminate the effects of a person's disability should be highlighted since they will alter the characteristics and total number of persons-in-need relative to the currently available services and programs.

Transparency/handout #12 is provided to each participant for a brainstorming exercise identifying the interorganizational network. It may be completed either individually, in small groups or with the workshop trainer leading the participants through each step. Depending upon the size of the room and number of participants, you may wish to divide into clusters of three or four to identify the agencies, organizations, groups and individuals. The workshop trainer will make a composite picture of the various networks on a transparency and, with active input from the participants, complete the remaining steps to the exercise as described on page 19 in the handbook.

The workshop trainer, using transparencies #13 and #14, will present an outline for profiling each agency and organization in the network with particular emphasis on linkage mechanisms.

Activity 4: FORMULATION AND ASSESSMENT OF TSC OBJECTIVES
(45 minutes)

- formulate TSC objectives
- assess feasibility of each objective

Several TSC objectives are presented to the participants (transparency #15). Other objectives may be formulated by the participants based upon their individual knowledge of and experience in their communities. The steps in conducting a feasibility assessment are described on pages 25-28 in the handbook and applied in assessing the feasibility of one of the predetermined objectives (transparency #16). The trainer presents the guiding questions which are answered through completion of the assessment (transparency #17).

Participants, in clusters, will initiate a feasibility assessment of a prepared TSC objective or one selected by themselves (transparency/handout #18). They will first determine the restraining and driving forces, and then the critical participants influencing implementation. All workshop participants, with the trainer, will complete the assessment as described in the previous example. A brief review of the guiding questions of a feasibility study concludes this stage of the process in establishing a TSC.

Activity 5: DISCUSSION AND WORKSHOP EVALUATION (15 minutes)

This time may be devoted to reviewing and discussing any or all of the morning topics, raising new issues or sharing information specific to the community in which the workshop is held. It may also be a time to evaluate the morning workshop activities, especially if the workshop scheduling permits minor modifications in the content or procedures of the afternoon session.

Afternoon Session

Activity 6: FORMATION OF A TSC (45 Minutes)

- choose TSC interorganizational structure
- ensure participation

The trainer reviews the major findings of the feasibility study and the four TSC functions which establish the context for determining an appropriate organizational structure of a TSC. The lecture highlights the underlying assumption for the two proposed structures on page 29 in the handbook. In small groups, participants discuss the problems regarding an interorganizational network functioning as a TSC (e.g., extent of control of one agency over another, distance, jurisdictional boundaries). Each group will diagram how a TSC may look, presenting its model on a large sheet of paper or transparency and explaining the rationale for such a TSC. The trainer presents two possible interorganizational structures (transparency #19) and guides the participants in examining the contribution of each structure to meeting different TSC functions and specific objectives.

A discussion on ways of ensuring appropriate representation or input to the ARC or similar agency concludes this stage of the planning process.

Activity 7: IMPLEMENTATION (105 minutes)

- select strategies to meet objectives
- establish responsibility
- determine staffing pattern
- assign staff to task responsibilities

This is what the workshop is all about - the establishment of a TSC implementation plan. The trainer will review implementation strategies and the essential elements of interagency agreements (transparencies #20, #21). The trainer will also review proposed TSC tasks (transparency #22) and describe the various responsibilities for parents, volunteers and professionals presented on page 40 of the handbook.

To conclude implementation, participants will be given an exercise on developing a TSC (handout #23). Plenty of time should be devoted to completing the exercise (45 to 60 minutes), preferably in small groups in quiet areas. Group members will present an outline of their group's implementation plan to all participants. The trainer should highlight the commonalities and distinctions as they relate to the material covered in the workshop, especially the four TSC functions.

It is important to spend sufficient time reviewing the instructions for the exercise. Based upon an identified problem situation/need and TSC objectives, the participants are asked to formulate implementation strategies and task responsibilities for the objective assigned their group. Underlying rationales for selecting strategies should be addressed based upon the group's assumptions regarding the feasibility of the objective and participants' personal experiences, knowledge and creativity. An example of the flow from TSC objective through implementation strategy, assigned task responsibility and rationale is presented to the participants (transparency/handout #24). This example may be revised to reflect the specific community in which the workshop is being held.

Someone in each group should be designated to summarize its plan of action. Large sheets of paper should be posted on the walls with the following headings to outline the plans: (1) objective; (2) strategies; (3) task responsibilities; and (4) rationale. Transparencies may be used as an alternative for presenting plans.

Activity 8: EVALUATION (15 minutes, optional)

- select evaluator(s)
- construct evaluation design

The trainer will highlight in a lecture the factors that should be considered in selecting an evaluator. Participants are walked through the evaluation design described on pages 46-49 in the handbook and illustrated in handout #25. The trainer should feel free to develop other examples to illustrate the evaluation design. Depending on time and importance of this stage to the participants, they may wish to work in small groups or collectively to develop their own evaluation design and discuss it.

Activity 9: WORKSHOP EVALUATION AND WRAP-UP (15 minutes)

An evaluation of the entire workshop should be completed in order to improve the effectiveness of future workshop presentations. The instrument used to evaluate the workshops in field-testing the training materials is attached (handout #26).

The wrap-up is an opportunity for the trainer to summarize the day's events, reinforce the need for TSCs, give a strong message of encouragement to those participants who are planning to develop a TSC, and indicate the technical assistance available to local ARC units and other developmental disabilities agencies from the ARC National Headquarters and the ten model TSCs.

SELF-ADVOCATE RESPONSES TO TRANSITION FROM SCHOOL TO ADULT LIFE

WE WANT SPECIAL EDUCATORS AND ADULT SERVICE PROVIDERS TO KNOW:

1. We need chances for adult education to catch up on things we didn't learn and to learn new skills.

2. Benefits need to be less confusing, take less time to get, and not penalize you if you earn money.

3. We can learn and do more if we can easily get more adaptations, like big print books, electric wheelchairs, and maybe computers.

4. There needs to be extra help for the families of adults, especially around graduation time when lots of things change.

SELF-ADVOCATE RESPONSES TO TRANSITION FROM SCHOOL TO ADULT LIFE

WE WANT EMPLOYERS AND OTHER COMMUNITY MEMBERS TO KNOW:

1. Give us a better chance for jobs. Sometimes that means giving people a chance to work part-time or to work on the parts of a job they can do.

2. Help us learn to do a good job. Expect us to work hard but show us exactly what you want done and tell us how we are doing in ways we can understand. Don't just brush us off. If you fire someone, tell them exactly why so they can do better next time. We need some understanding but not pity.

SELF-ADVOCATE RESPONSES TO TRANSITION FROM SCHOOL TO ADULT LIFE

WE WANT OUR PARENTS AND FAMILY MEMBERS TO KNOW:

1. Push us to do more and learn more. Don't treat us like children who can't learn how to handle things or push us aside from responsibilities.

2. It takes a lot of courage to move away from home and to try to go to work. Most of us need help to make the change and some kinds of help from now on. Families should help us get the help we need and expect us to have the courage to be adults. Some parents are overprotective; they need courage to face our growing up too.

TRANSITION ALTERNATIVES

1. Transition With Ongoing Special Services
   - Supported Competitive Employment
   - Work Crews and Enclaves
   - Specialized Industrial Training
2. Transition With Time-Limited Special Services
3. Transition Without Special Services

AREAS OF ASSISTANCE DURING TRANSITION

1. Relevant elementary and secondary education
2. Individualized planning with parents, professionals and students
3. Relevant post-secondary training
4. Job creation
5. Identification of available jobs
6. Analysis of skills needed to perform jobs
7. Career counseling
8. Placement assistance
9. Job specific teaching
10. Job adaptation and/or assistive devices
11. Ongoing support at work
12. Support services (e.g., transportation, recreation)
13. Community living arrangement

TRANSITIONAL SERVICE CENTERS

PRINCIPAL FUNCTIONS:

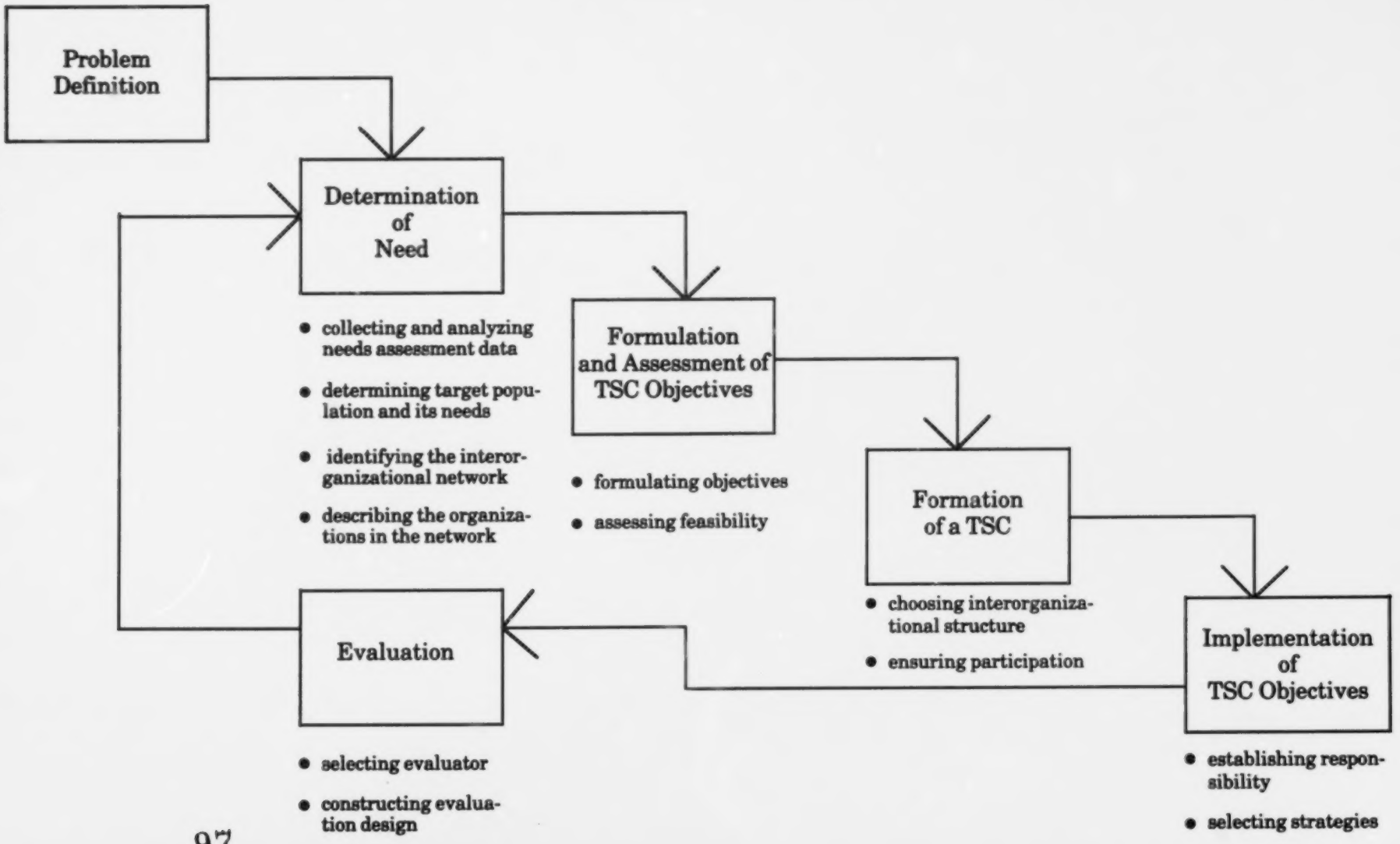
1. Assist in the location of and access to the most appropriate combination of services and resources to meet the needs of students or clients with mental retardation and other developmental disabilities

2. Systematically collect, maintain and disseminate information on services and resources available to meet the needs of students or clients with mental retardation and other developmental disabilities

3. Assist in the development and support of relationships among agencies and organizations that promote coordinated services to students or clients with mental retardation and other developmental disabilities

4. Assist in the development of new programs and services for students or clients with mental retardation and other developmental disabilities

PLANNING STAGES IN ESTABLISHING A TRANSITIONAL SERVICE CENTER


Problem Definition
Determination of Need
• collecting and analyzing needs assessment data
• determining target population and its needs
• identifying the interorganizational network
• describing the organizations in the network
Formulation and Assessment of TSC Objectives
• formulating objectives
• assessing feasibility
Formation of a TSC
• choosing interorganizational structure
• ensuring participation
Implementation of TSC Objectives
• establishing responsibility
• selecting strategies
Evaluation
• selecting evaluator
• constructing evaluation design

TSC SERVICE AND PROGRAM QUALITIES

1. Integration

2. Age Appropriate

3. Community Referenced

4. Comprehensive

5. Self-Advocate Involvement

6. Family Involvement

7. Effectiveness

COMPREHENSIVE COMMUNITY SERVICES AND PROGRAMS

COMMUNITY LIVING ALTERNATIVES	EMPLOYMENT-HABILITATION PROGRAMS	SUPPORT SERVICES
1. Independent living	1. Competitive employment	1. Health
2. Staffed apartment	2. Supported employment	2. Mental health
3. Group home	3. Sheltered workshop	3. Legal
4. Living at home	4. Work activity	4. Home assistance
5. Adult foster home	5. Day training programs	5. Recreation
		6. Protective
		7. Transportation
		8. Advocacy
		9. Case management

BEHAVIORAL SKILL TRAINING AREAS FOR SELECTED COMMUNITY LIVING ALTERNATIVES

GROUP HOME

1. Health care
2. Laundry skills
3. Meal preparation
4. Social integration
5. Uses an expressive language system
6. Home safety
7. Money concepts
8. Unprompted daily routine
9. Recreation and leisure activities
10. Community access

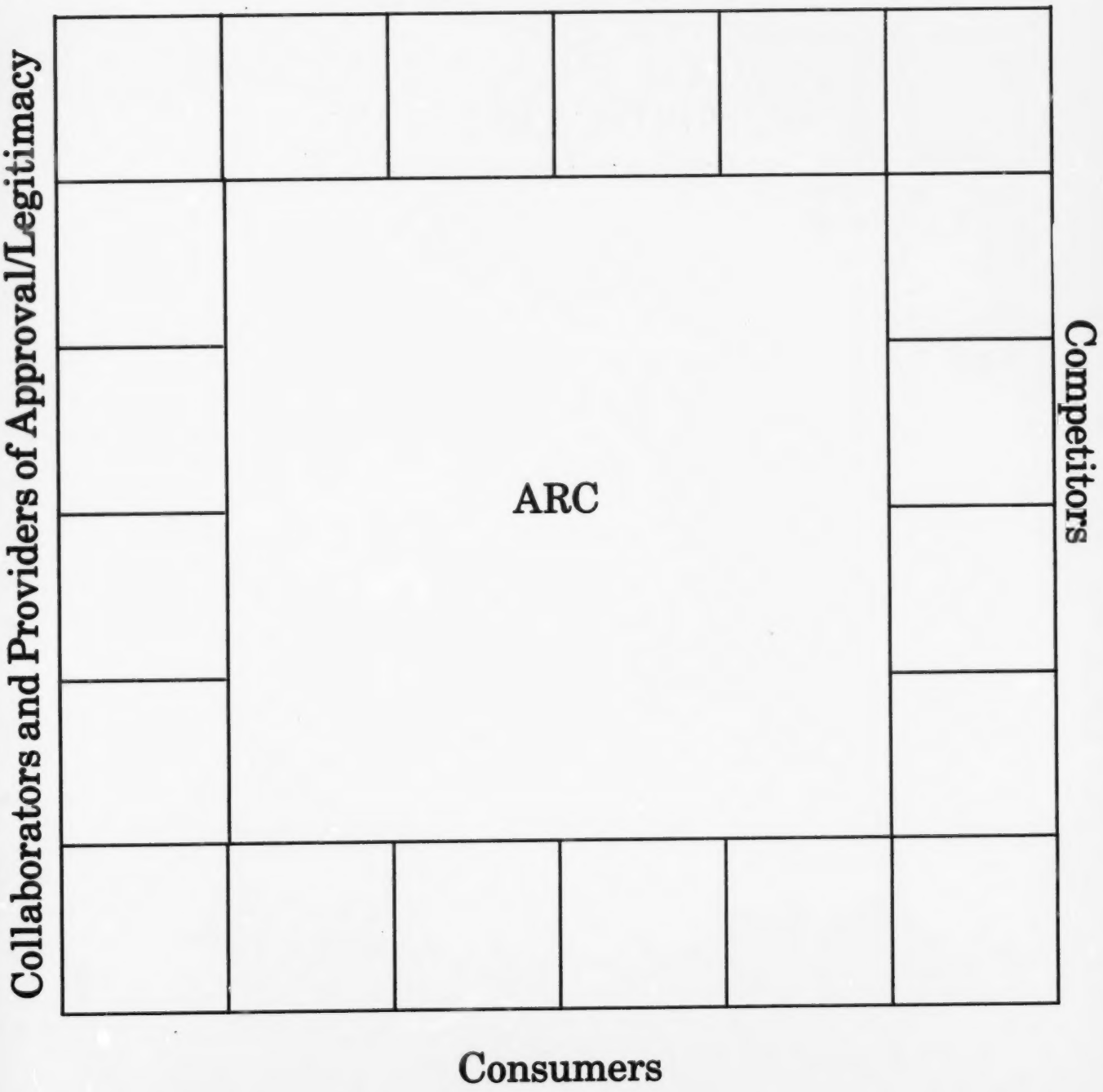
INDEPENDENT LIVING

1. Handles medication
2. Clothing repair/ replacement
3. Meal planning and shopping
4. Interpersonal relations
5. Language generalization
6. Coping skills
7. Independent money usage
8. Independent scheduling
9. Uses community recreation facilities
10. Independent community use

BEHAVORIAL SKILL TRAINING AREAS FOR SELECTED EMPLOYMENT-HABILITATION PROGRAMS

SUPPORTED EMPLOYMENT
(e.g., enclaves, crews)

INTERORGANIZATIONAL NETWORK



ORGANIZATIONAL DESCRIPTION

1. Goals, objectives and agency responsibilities
2. Problems addressed by agency and extent
3. Services and programs provided
4. Linkages
5. Eligibility
6. Client profile: age and sex; socio-economic status; place of residence; most frequent presenting problem or concern
7. Admission criteria
8. Client selection and screening mechanisms
9. Methods of assessing client's needs
10. Agency pressures to accept or reject certain client groups
11. Client representation in the agency
12. Conflicts and gaps in client services and service delivery patterns. Steps to resolve conflicts and close gaps
13. Staff profile: experience; professional training; functions

GLOSSARY OF LINKAGE MECHANISMS

1. Case management
2. Client team
3. Information clearinghouse
4. Budgeting, fundraising and allocation
5. Intake, screening and diagnosis
6. Program design, operation and evaluation
7. Public relations and community education
8. Training and staff development
9. Purchase of services
10. Staff outstationing

TSC OBJECTIVES

1. To work with employers for purposes of identifying and creating job opportunities for persons with mental retardation and other developmental disabilities

2. To work with parents to ensure them of their due process rights under Public Law 94-142 when the school does not provide appropriate education

3. To ensure comprehensive documentation and dissemination to parents, legal guardians and adult service providers of model employment programs for persons with severe and profound mental retardation and other developmental disabilities

FEASIBILITY ASSESSMENT

Problem Situation or Need

Many students with mental retardation and other developmental disabilities are unable to obtain meaningful employment upon graduation

Objective

To work with employers to identify and create job opportunities for persons with mental retardation and other developmental disabilities

(HLU) Importance	(HLU) Amenability	Participants	Restraining Forces (against change)	Driving Forces (for change)	Participants	(HLU) Amenability	(HLU) Importance
H	U		1 lack of funds	tax incentives 1	C/X	H	H
H	H	A/X	2 back-to-basics school curriculum	federal legislation 2		L	U
H	U		3 orientation of voc. training program	new employment models 3	B/C	H	H
H	H	B/X	4 lack of interagency cooperation	enlightened employers 4		H	U
			5	existence of an ARC 5	X	H	H
			6	6			

Critical Participants

A	Dir. of Special Education	D	
B	Dept. of Voc. Rehab.	E	
C	Pres. of Bank	X	Parents

(HLU) H = high; L = low; U = uncertain

GUIDING QUESTIONS ON FEASIBILITY OF TSC OBJECTIVES

1. Does the ARC or similar agency have sufficient support of other critical participants (i.e., agencies, organizations, groups and individuals) in the community to meet TSC objectives?

2. What has to happen to allow the TSC objectives to be implemented?

FEASIBILITY ASSESSMENT

Problem Situation or Need

Many students with mental retardation and other developmental disabilities are unable to obtain meaningful employment upon graduation

Objective

(HLU) Importance	(HLU) Amenability	(HLU) Participants	Restraining Forces (against change)	Driving Forces (for change)	(HLU) Participants	(HLU) Amenability	(HLU) Importance
			1	1			
			2	2			
			3	3			
			4	4			
			5	5			
			6	6			

Critical Participants

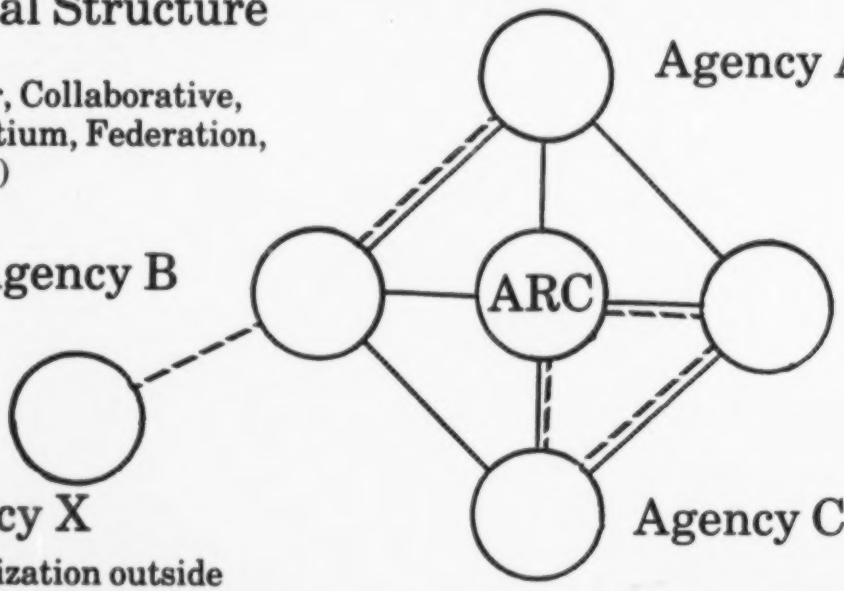
A	D
B	E
C	X

(HLU) H = high; = low; U = uncertain

TSC INTERORGANIZATIONAL STRUCTURES

Formal Structure

(Center, Collaborative, Consortium, Federation, System)

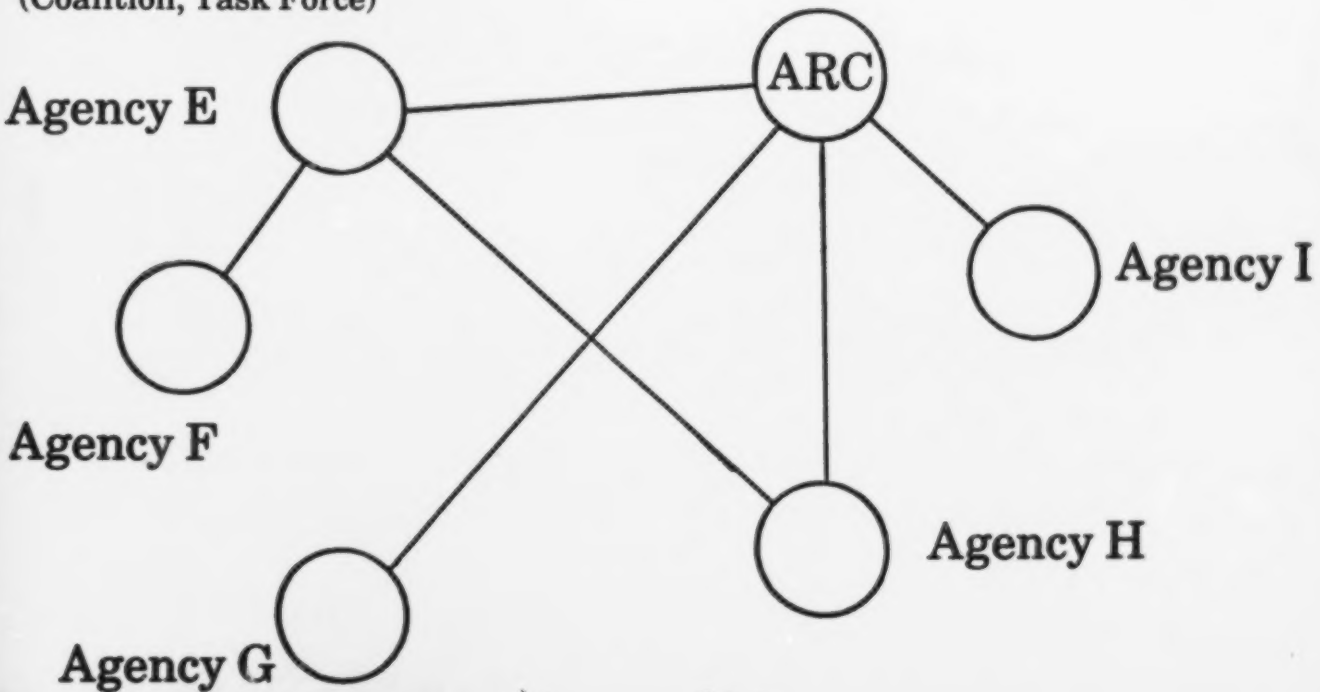


(Organization outside the formal structure)

---- Sub-group

Informal Structure

(Coalition, Task Force)



IMPLEMENTATION STRATEGIES

1. COOPERATION:
   The TSC encounters agreement on the objective(s) and its participants work cooperatively on the objective(s) so that their combined activity will accomplish it.

2. CAMPAIGN:
   The TSC seeks to bring about agreement on its objective(s) with the various participants, making a cooperative strategy possible as well as reducing the possibility of outright opposition. The TSC may need to modify the objectives; or it may need to offer inducements for cooperation so that the objective(s) becomes acceptable on some basis other than its own merits.

3. CONTEST:
   Agencies, organizations, groups and/or individuals in the community are seeking incompatible outcomes and the TSC attempts to defeat opposition to its objective(s).

ESSENTIAL ELEMENTS OF INTERAGENCY AGREEMENTS

1. Definitions
2. Forms and formats
3. Referral
4. Entitlements
5. Complementarity
6. Transitions
7. Planning and budgetary calendars
8. Coordinated, comprehensive community planning
9. Coordinated staff development
10. Fiscal administration
11. Integrated data base
12. Cooperative evaluations and monitoring

PROPOSED TSC TASKS FOR PARENTS, VOLUNTEERS AND PROFESSIONALS

1. Enrollment

2. Monitoring

3. Maintenance

4. Community living assistance

5. Community vocational placement assistance

6. Community integration assistance

7. Systems-level operation

TRANSITIONAL SERVICE CENTERS

Small Group Exercise

Purpose:

This exercise gives workshop participants the opportunity to prepare a TSC implementation plan based upon a stated problem situation/need and TSC objectives. The relationship between objectives and implementation strategies should become clearer as participants examine the underlying rationale for the selection of their strategies. Brief presentations and discussion of each group's implementation plan will provide a more comprehensive view of transition and a reference for future planning in all agencies wanting to assist students or clients with mental retardation and other developmental disabilities in transition.

Problem Situation/Need:

There are a minimum of vocationally-oriented services and programs and employment opportunities for students or clients with severe and profound mental retardation in your community.

Objectives:

(1) To work with employers for purposes of identifying and creating job opportunities for students or clients with mental retardation and other developmental disabilities.

(2) To work with parents of students with mental retardation and other developmental disabilities to ensure them of their due process rights under Public Law 94-142.

(3) To work with schools and service agencies to develop an information system on current programs, services and job opportunities for students or clients with mental retardation and other developmental disabilities.

(4) To work with local schools and vocational rehabilitation agency to promote understanding and agreements which will result in improved vocational services and programs for students or clients with mental retardation and other developmental disabilities.

(continued on next page)

Procedures:

Based upon the above problem situation/need and TSC objectives, each group will:

(1) formulate implementation strategies for its designated objective; and

(2) assign task responsibilities.

Be prepared to present your implementation plan to all workshop participants and to discuss the **rationale** for selecting the implementation strategies. The rationale should draw upon the group's assumptions on the feasibility of each objective which influence the choice of implementation strategies.

TSC IMPLEMENTATION PLAN

OBJECTIVE: To work with employers for purposes of identifying and creating job opportunities for persons with mental retardation and other developmental disabilities

STRATEGIES:	ASSIGNED TASK RESPONSIBILITIES:
1. To educate state and local policymakers and employers on supported employment models and the economic benefits of employing persons with mental retardation and other developmental disabilities	1. Vocational educators; ARC staff members; researchers
2. To initiate a supported employment project in industry	2. Employers; ARC staff members; job coach

RATIONALE: The objective and its strategies are in response to the poor integration of recent graduates and adults with mental retardation and other developmental disabilities into supported work opportunities. There is some disagreement among vocational educators, rehabilitation counselors and employers over the employment qualifications of these individuals. Resources may need to be redistributed and new resources found.

TSC EVALUATION DESIGN

TSC Function: Assist in the development of new programs and services for students or clients with mental retardation and other developmental disabilities

Objective	Strategies	Evaluation Questions	Information Need	Source of Information
To create job opportunities for persons with mental retardation and other developmental disabilities	To educate state and local policymakers and employers on supported employment models and the economic benefits of employing adults with mental retardation and other developmental disabilities	Input: How many and what types of educational programs have initiated for state and local policymakers and employers on supported employment models, and the economic benefits of em-employing the target population? Process: Do employers utilize knowledge obtained on tax incentives when developing new jobs? Outcome: Have employment opportunities increased after the state and local policymakers, and employers experienced an educational program?	The program planners have agreed that educating state and local policymakers, and employers is a necessity for increasing job opportunities. The information needed is that information which provide evidence that individuals attending educational programs understand the material presented; that employers use the tax incentives in developing new jobs; that employers hire persons with mental retardation and other developmental disabilities; and policymakers work to continue these tax incentives. The TSC staff will utilize this information to improve the design and content of the educational program.	Direct observation by the evaluator; survey of state and local policymakers and employers; records of attendance at educational programs; voting records; employment statistics
To work with students or clients for purposes of increasing job opportunities	To train clients in job search skills	Input: How many and what types of job search training programs have been initiated for clients? Process: Do clients utilize job search skills when searching for jobs? Outcome: Do clients have a higher rate of employment after utilizing this training program?	The program planners have agreed that improved job search skills is a necessity for client employability. The information needed is that information which will indicate the number and type of job search training programs provided; the clients in attendance; what job search skills taught are used by clients; the employment rate of these clients. The TSC staff will utilize this information to determine which job search training programs to continue.	Direct observation by the evaluator; employment records; report of the trainers

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TRANSITIONAL SERVICE CENTERS WORKSHOP

Evaluation Form

Attended workshop as (check only one):

____Member of ARC unit

____Staff of ARC unit

____Member of other developmental disabilities agency

____Staff of other developmental disabilities agency

____Professional in special education, vocational education, vocational rehabilitation

____Current or potential employer

____Other

Please rate the following items:

1. The objectives of the workshop were.....	5 Evident	4	3	2	1 Vague
2. The objectives of the workshop were.....	5 Accomplished	4	3	2	1 Not Accomplished
3. The organization of the workshop was.....	5 Excellent	4	3	2	1 Poor
4. My attendance at the workshop should prove.....	5 Beneficial	4	3	2	1 No Benefit
5. In my current responsibilities the workshop was.....	5 Relevant	4	3	2	1 Not Relevant
6. In the field of transition the workshop was.....	5 Relevant	4	3	2	1 Not Relevant
7. The exercises used in the workshop were.....	5 Beneficial	4	3	2	1 No Benefit
8. The transparencies used in the workshop were.....	5 Beneficial	4	3	2	1 No Benefit
9. The opportunity to express one's views was.....	5 Excellent	4	3	2	1 Poor

Please rate each of the following workshop presentations:

10. Introduction to the problem and issues.....	5 Excellent	4	3	2	1 Poor
11. Determination of Need and TSC Objectives.....	5 Excellent	4	3	2	1 Poor
12. Determination of Feasibility.....	5 Excellent	4	3	2	1 Poor
13. Formation of a TSC.....	5 Excellent	4	3	2	1 Poor
14. Implementation of TSC Objectives.....	5 Excellent	4	3	2	1 Poor

Please answer the following (use back side of page if needed):

15. The most beneficial part of this workshop was:_____

_____

16. The least beneficial part of this workshop was:_____

_____

17. What suggestions would you make for improving this workshop:_____

_____

18. Any other comments:_____

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